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WATERTON TOURISM STUDY

SURVEY REPORTS

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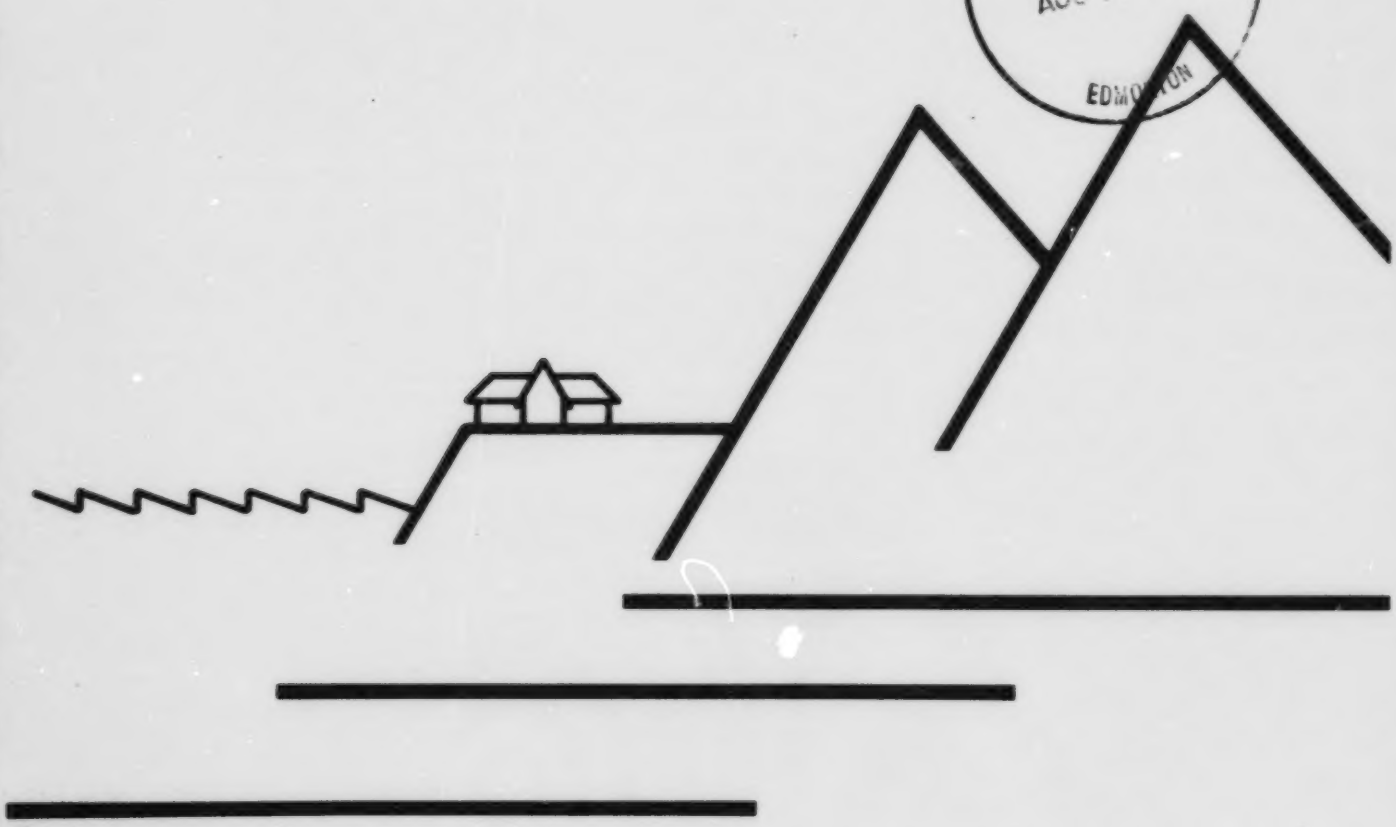

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February, 1991

TO WHOM IT MAY CONCERN

The following report was undertaken as part of the Waterton Tourism Study. It contains a series of smaller research projects, and supplements the major exit survey that was conducted for this study. Much of the work for the study was completed in 1988. However, verification of some of the data from the surveys was required. Due to unforeseen delays, the study is only now being released. It is felt that the information obtained from the study is still relevant.

Results from these small surveys are not statistically reliable due to the small number of people interviewed. The results can, however, be used as indicators, or guidelines; that is, it provides an indication of respondents' views.

It should be noted that this study was conducted by an independent consultant commissioned by Alberta Tourism. As such, this study does not represent government policy, nor does it imply any commitment to implementation. It is recognized that implementation of the marketing strategy will be addressed in a manner that is consistent with Canadian Parks Service policies, and the park management planning process.

If you have any comments regarding the report, please contact:

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Yours sincerely,

Bernard F. Campbell
Deputy Minister

WATERTON TOURISM STUDY

SURVEY REPORTS

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WATERTON TOURISM STUDY

SURVEY OF MOTORCOACH VISITORS

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Alberta Tourism

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March 1988

Revised Spring, 1990

WATERTON TOURISM STUDY

SURVEY OF MOTORCOACH VISITORS

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WATERTON TOURISM STUDY

SURVEY OF MOTORCOACH VISITORS

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1.0 INTRODUCTION

This survey is one of a series of surveys designed to supplement the Exit Survey of visitors to Waterton Lakes National Park during the period of November 1, 1986 to October 31, 1987. The Exit Survey was designed to measure the perceptions, attitudes and behaviours of visitors to the Park. A separate report on the Exit Survey was prepared.

Because of the difficulty of stopping and interviewing visitors on motorcoach tours as part of the normal procedure, it was decided to conduct a separate survey of motorcoach visitors. Another survey was conducted of the motorcoach tour drivers and escorts. The results of this survey are presented in a separate report.

Based on our interviews with accommodation and attraction operators and Park staff, it was estimated that some 300 motorcoaches entered the Park each year. The passengers on a number of these motorcoaches overnight in the Park, thus requiring the use of accommodation. It follows that individuals in this category can be contacted and interviewed sometime between their arrival and departure while in the vicinity of the hotel/motel at which they are staying. Those visitors on motorcoaches entering the Park on a day visit basis can be contacted and interviewed at some other stopping point during their visit. The net result of variations in these factors is that it becomes problematic to ensure that a fully representative sample of all motorcoach visitors is selected and interviewed. Nevertheless, by thoroughly identifying the motorcoach population and identifying the characteristic movements in the Park, it has been possible to obtain a sample which is believed to be reasonably representative of all motorcoach visitors.

2.0 PURPOSE AND OBJECTIVES

The overall purpose of this survey was to provide a basic understanding of the characteristics, attitudes and behaviours of motorcoach tour visitors to Waterton Lakes National Park. The specific objectives of the motorcoach survey were:

1. to profile motorcoach tour visitors in terms of their socio-demographic characteristics;

2. to measure key trip characteristics related to motorcoach tour visitors;

3. to measure perceptions, attitudes and satisfaction levels of motorcoach tour visitors concerning their visit to Waterton Lakes National Park;

4. to measure selective behavioral and expenditure patterns of motorcoach tour visitors; and

5. to estimate the population of motorcoach tours and visitors to Waterton Lakes National Park.

3.0 METHODOLOGY

It was estimated prior to the survey that the total population of motorcoach tours coming into Waterton during a twelve month period was 300 and the overwhelming majority of motorcoaches visited the Park between July 1 and August 31. Based on interviews of accommodation and boat tour operators and a record of motorcoaches in the Park during this period produced by the survey staff, the estimate of motorcoaches entering the Park during the period November 1, 1986 to October 31, 1987 is 290.

The sample objective for the motorcoach survey was the completion of 400 passenger questionnaires. At the outset of the survey, it was estimated that 80 to 100 motorcoaches would need to be surveyed based on a selection of one out of eight passengers on each motorcoach. At the conclusion of the survey period, 401 questionnaires were completed by passengers on 85 motorcoaches.

The number of tour passenger questionnaires distributed was based on the following schedule:

Number of Passengers	Number of Questionnaires
1 - 8	1
9 - 16	2
17 - 24	3
25 - 32	4
33 - 40	5
41 +	6

The average tour motorcoach has 47 seats with most companies restricting the number of travellers to 44 passengers plus the tour escort and driver. The average number of passengers on each motorcoach arriving in Waterton was 32 based on the results of the survey of tour escorts or drivers. The estimated total number of motorcoach tour passengers visiting the park during the twelve month period is 9,280.

In order to achieve our survey objectives of completing a minimum of 400 completed tour passenger questionnaires, approximately one out of three motorcoach tours were sampled. This included motorcoach tours stopping in Waterton for the day and overnight. If the escort or driver of a motorcoach refused to allow their passengers to be surveyed, the next motorcoach was sampled. The survey population was defined by the hotel and attraction operators in Waterton Lakes National Park. Each hotel operation was visited approximately once a week to identify the scheduled dates and times of arrival and departure for motorcoach tours at their respective operations. We asked for a list of motorcoach tour groups arriving for the day to eat lunch or dinner, and those that were staying overnight. The cruise boat operation was also visited to establish when groups were booked onto sightseeing cruises.

Motorcoach passengers were usually surveyed immediately before departure from their accommodation in the morning on the last day of their visit to the Park or after their boat cruise or dinner if the tour was not staying overnight. The questionnaires took an average of six minutes for respondents to complete. The completed questionnaires were normally returned to the survey person via the tour escort or driver.

The survey person usually contacted the escort or driver the night before the survey to inform them and ask for their cooperation in conducting the survey. The escort or driver were also asked to complete a questionnaire (results presented in a separate report). Approximately 20 escorts or drivers refused to cooperate in conducting the survey of their tour passengers. In the case of a refusal, the next tour scheduled to depart the Park was selected as a replacement.

The distribution of completed interviews by location is presented in Table 1.

Table 1
Location of Interviews

(n = 401)

Location	No.	%
Bayshore Inn	58	14.5
Marina, Waterton Lake, Boat Dock	47	11.7
Prince of Wales Hotel	234	58.4
Kilmorey Lodge	31	7.7
Golf Course	8	2.0
Aspen - Wildflower Motel	16	4.0
El Cortez Motel	6	1.5
Unknown	1	0.2
TOTAL	401	100.0%

Note: Totals may not add to 100.0% due to rounding.

Most of the motorcoach tours (70 to 75%) visit and stay overnight at the Prince of Wales Hotel. The results of the survey tend to underestimate the responses related to the Prince of Wales Hotel since a major U.S. tour company proved to be quite uncooperative in allowing the administration of the survey to their passengers.

A major disappointment in the survey results is the lack of statistical confidence in the expenditure responses. Based on our discussions with the escorts/drivers, it was estimated that the expenditure data would not represent expenditures by the motorcoach visitors. Numerous inconsistencies in the reporting of expenditures was found. For instance, many respondents reported accommodation expenditures when in almost all cases, the cost of accommodation was included in the cost of the tour. Many respondents also indicated payment for the boat cruise in situations that the tour company included it in the cost of the tour.

4.0 PROFILE OF MOTORCOACH VISITORS

4.1 Origin of Motorcoach Visitors

The origin of motorcoach visitors who were sampled is summarized in Table 2. Nearly 77% of all visitors in the sample originate in the United States as compared with only 21% from Canada.

Nearly 18% of all motorcoach visitors were from Alberta with only 4% from other parts of Canada. In contrast, there was a fairly wide distribution in terms of the geographic origin of U.S. visitors. The states of California, New Jersey, Florida and New York provided the highest number of respondents, with California ranking first with 10.6% of all motorcoach visitors. Of note is the absence of visitors from the northwest and central mid-west states.

Table 2
Origin of Motorcoach Visitors in Sample

(n=398)

Origin	%	
Alberta	17.6	
Saskatchewan	1.0	
British Columbia	1.0	
Ontario	1.0	
Quebec	0.8	21.4%
Other States	12.1	
California	10.6	
New Jersey	7.0	
New York	6.3	
Florida	6.3	
Utah	5.5	
Illinois	4.5	
Pennsylvania	4.5	
Wisconsin	3.5	
Texas	2.8	
Minnesota	2.5	
Ohio	2.3	
Idaho	1.8	
Maryland	1.8	
Missouri	1.8	
Louisiana	1.8	
Arizona	1.5	76.6%
Other Countries	2.0	2.0%
	100.0%	100.0%

Note: Totals may not add to 100.0% due to rounding.

4.2 Age of Respondents

The motorcoach visitors are clearly not representative of the general population in terms of age. As shown in Table 3, 84.7% of the total sample consisted of individuals 55 years of age or older. In fact, the single most important age category (at 46.2%) was the 65 to 74 year old respondent.

While it has been generally recognized that the motorcoach tour market is dominated by older individuals, the results from this survey clearly emphasize the very distinct nature of the motorcoach tour visitor in terms of age. Indeed, this one dominate characteristic of the respondents will need to be kept clearly in mind in reviewing and interpreting the findings of this study for marketing of motorcoach tours to Waterton Lakes National Park.

Table 3
Age Distribution of Respondents

(n=377)

Age Category (years)	%
6 - 19	0.6
20 - 24	1.3
25 - 34	3.2
35 - 44	4.5
45 - 54	5.8
55 - 64	27.9
65 - 74	46.2
75 +	10.6
TOTAL	100.0

Non-responses = 24

Note: Totals may not add to 100.0% due to rounding.

4.3 Personal and Household Income of Respondents

The data describing the personal income distribution of respondents (see Table 4) revealed a fairly diverse range of incomes. Indeed, each of the income categories employed contained a sizeable percentage of the total sample. The percentage of the sample ranged from 8.2 to 19.7%.

The picture which emerges, however, changes somewhat when total household income is examined (Table 5). Where as only 13.3% of individual respondents reported incomes of $70,000 or more, this percentage rose substantially to 33.3% when total household income was taken into account. At the other end of the scale, only 1.4% reported total household incomes of less than $10,000 as opposed to 8.2% of individuals.

In more aggregate terms the figures revealed that nearly two-thirds of the motorcoach visitors reported total household income in excess of $40,000.

Due to high level of non-response, there may be a bias in the income distribution of respondents. However, the results seem to correlate to other studies that show higher income travellers on motorcoach tours to the Canadian Rockies.

Table 4

Personal Income Distribution of Respondents

(n=233)

Income Category	%
Less than $10,000 Cdn.	8.2
$10,000 - $19,999 Cdn.	13.3
$20,000 - $29,999 Cdn.	19.7
$30,000 - $39,999 Cdn.	14.2
$40,000 - $49,999 Cdn.	12.0
$50,000 - $59,999 Cdn.	8.2
$60,000 - $69,999 Cdn.	11.2
$70,000 Cdn. plus	13.3
TOTAL	100.0%

Non-responses = 168

Note: Totals may not add to 100.0% due to rounding.

Table 5

Total Household Income Distribution of Respondents

(n=141)

Income Category	%
Less than $10,000 Cdn.	1.4
$10,000 - $19,999 Cdn.	7.8
$20,000 - $29,999 Cdn.	14.9
$30,000 - $39,999 Cdn.	12.1
$40,000 - $49,999 Cdn.	9.2
$50,000 - $59,999 Cdn.	8.5
$60,000 - $69,999 Cdn.	12.8
$70,000 Cdn. plus	33.3
TOTAL	100.0%

Non-responses = 260

Note: Totals may not add to 100.0% due to rounding.

4.4 Male/Female Composition of Sample

The data in Table 6 reveals a fairly balanced sample was obtained in terms of male/female responses. As shown 42% of the questionnaires were completed by males and 58% by females.

Table 6

Male/Female Composition of Sample

(n=357)

Sex	%
Male	41.7
Female	58.3
Total	100.0%

Non-responses = 44

Note: Totals may not add to 100.0% due to rounding.

4.5 Occupation of Respondents

When asked if they were employed, 261 respondents were either retired or unemployed. Based on all responses, the overwhelming majority were retired (69.1%) compared to 28.1% employed and 2.8 unemployed.

As shown in Table 7, "educator" was the only single dominant occupation category at 24% of the employed respondents. The only other three categories that stood out were "medical", "labourer", and "manager".

Table 7

Occupational Categories of Employed Respondents

(n=108)

Occupational Category	% of Employed Respondents
Educator	24.1
Manager	7.4
Clerk	4.6
Salesman	6.5
Attorney/Lawyer	0.9
Secretary	2.8
Banker	1.9
Corrections	0.9
Clergyman	0.9
Machinist	3.7
Owner	2.8
Medical	9.3
Engineer	2.8
Editor	0.9
Manager	4.6
Public Speaker	0.9
Labourer	12.0
Student	4.6
Social Worker	0.9
Agent	0.9
Architect	1.9
Consultant	1.9
Lawyer	0.9
TOTAL	100.0%

Non-responses = 293

Note: Totals may not add to 100.0% due to rounding.

4.6 Education of Respondents

As shown in Table 8, motorcoach tour visitors to Waterton are well educated with nearly 56% having some university, graduate or post-graduate education. Only 13% of the respondents did not graduate from high school or secondary school. The education characteristics correlate highly with above average incomes.

Table 8
Education of Respondents

(n=357)

Education Category	%
No formal education	0.3
Some grade school	1.1
Completed grade school	5.0
Some high school or secondary school	6.4
High school or secondary school graduate	21.6
Some vocational or technical school	3.9
Vocational or technical school graduate	5.9
Some university	19.6
University graduate	17.9
Post graduate university	18.2
TOTAL	100.0%

Non-responses = 44

Note: Totals may not add to 100.0% due to rounding.

5.0 TRIP CHARACTERISTICS

5.1 Purpose of Trip

As shown in Table 9, the motorcoach tour visitor is simply on vacation. Nearly 84% of those interviewed were in this category. Day activity was the next largest category of respondents at 4.3%. However, many of the other responses such as "tour with friends", "short trip", "sightseeing" and "fun of travel" could be added to the vacation or day activity responses.

Table 9
Purpose of Trip

(n=394)

Purpose	%
Vacation	83.5
Day Activity	4.3
Other	4.1
Special Meeting	3.6
Short Trip	1.0
Tour with Friends	0.8
Travel Tour	0.8
Golf Trip	0.8
Exchange Visit	0.5
Sightseeing	0.3
Fun of Travel	0.3
Cultural Trip	0.3
TOTAL	100.0%

Non-responses = 7

Note: Totals may not add to 100.0% due to rounding.

5.2 Nights Away from Home

Table 10 provides a summary of the length of trip of the motorcoach tour passengers as measured by the number of nights away from home on the trip. This includes all nights on the trip, not just the motorcoach tour. Of interest is the fact that nearly 30% of respondents were away from home for a period of a week or less. Conversely, only 3% were away from home for three weeks or more. Most (nearly 68%) were on a trip between 8 to 20 days. The average number of nights away from home was 10.0 nights.

Table 10
Nights Away from Home On Trip

(n = 366)

Nights Away From Home	%
0	3.3
1	4.4
2	4.9
3	1.4
4	4.6
5	1.4
6	3.3
7	6.3
8	13.4
9	9.8
10	7.4
11 - 15	24.9
16 - 20	12.3
21 +	2.7
TOTAL	100.0%

Non-responses = 35

Note: Totals may not add to 100.0% due to rounding.

5.3 Where Motorcoach Tour Was Purchased

In the motorcoach market, the travel agent clearly dominates as the main source of purchasing a motorcoach tour at 54% of respondents. The other major source, at nearly 30%, was directly from the tour operator.

Table 11
Where Motorcoach Tour Purchased

(n = 386)

Where Purchased	%
Travel Agent	53.6
Tour Operator	29.5
Convention Organizer	5.2
Legion or Church Organization	2.8
Amtrack	1.6
Other	7.3
TOTAL	100.0%

Non-responses = 15

Note: Totals may not add to 100.0% due to rounding.

5.4 Timing of Decision

From a marketing perspective, it is extremely important to know the timing of decisions concerning particular trips. As the data in Table 12 shows, nearly two-thirds of all decisions concerning motorcoach trips were made one to six months prior to the trip itself. More than 52% of decisions to take a trip were made less than three months in advance of the tour departure. Conversely, only 17% of the respondents made their decision more than 6 months in advance.

Table 12
Timing of Decision to Go on Tour

(n = 394)

Timing	%
Within Past Month	16.2
Past 1 - 3 Months	36.3
Past 3 - 6 Months	30.2
Past 6 - 12 Months	15.0
More than 1 Year Ago	2.3
TOTAL	100.0%

Non-responses = 7

Note: Totals may not add to 100.0% due to rounding.

5.5 Previous Visitation to Waterton

Finally, in terms of trip characteristics, the results in Table 13 demonstrate that the motorcoach tour visitor represents a first time visitor market. Some 81% of respondents reported that they had not previously visited Waterton Lakes National Park.

Table 13
Previous Visitation to Waterton

(n = 396)

Previously Visited	%
Yes	18.9
No	81.1
TOTAL	100.0%

Non-responses = 5

Note: Totals may not add to 100.0% due to rounding.

6.0 PERCEPTIONS AND ATTITUDES CONCERNING WATERTON LAKES NATIONAL PARK EXPERIENCE

6.1 Importance of Waterton in Tour Choice

According to over 64% of respondents (see Table 14), the visit to Waterton Lakes National Park was an important factor in their choice of the particular trip. Conversely, some 36% reported that the inclusion of Waterton on the tour did not particularly influence their decision.

Table 14
Was Waterton Important in Selection of Tour?

(n = 385)

Important?	%
Yes	64.2
No	35.8
Total	100.0%

Non-responses = 16

Note: Totals may not add to 100.0% due to rounding.

6.2 Appropriateness of Time in Waterton

The great majority (62%) of respondents considered the amount of time spent in Waterton on the tour was appropriate. Some 38% (see Table 15) perceived the time allocation as too short. Only one person (0.3%) felt their stay in the Park had been too long. The responses to this question may indicate an opportunity to promote a more extensive itinerary to tour operators which may result in a longer stay in Waterton.

Table 15
Appropriateness of Time Allocation to Visit Waterton Park

(n = 395)

Appropriateness	%
Too Short	38.0
About Right	61.8
Too Long	0.3
TOTAL	100.0%

Non-responses = 6

Note: Totals may not add to 100.0% due to rounding.

6.3 Satisfaction Levels with Visit

Respondents were generally quite satisfied with their visit to Waterton Lakes National Park. Some 42% rated the experience as excellent with another 52% rating it as good. Only 5% viewed the experience as fair, and only 0.5% (2 persons) reported a poor experience. It would appear that Waterton is providing a very satisfactory experience to current motorcoach tour visitors.

Table 16
Satisfaction Level with Visit

(n = 394)

Satisfaction Level	%
Poor	0.5
Fair	5.1
Good	52.3
Excellent	42.1
TOTAL	100.0%

Non-responses = 7

Note: Totals may not add to 100.0% due to rounding.

6.4 What Tour Visitors Liked Most

When asked what they liked most of their visit to Waterton Lakes National Park, visitors provided a very clear and unambiguous response. As seen from Table 17, the scenery in the Park was by far the most important factor in contributing to their high level of satisfaction. Some 66% of respondents indicated that the scenery in Waterton was what they liked the most. Other significant items mentioned were the boat trip, the Rockies (the major aspect of scenery), the friendly people and the Prince of Wales Hotel.

Table 17

What Tour Visitors Liked Most About Waterton Lakes National Park

(n = 356)

Item	% of Responses	% of Respondents *
Scenery	41.6	66.0
Holiday Atmosphere	2.3	3.7
Rockies	6.5	10.4
Boat Trip	11.7	18.5
Services	4.6	7.3
Lake	4.8	7.6
Prince of Wales Hotel	6.4	10.1
Food	4.8	7.6
Friendly People	6.9	11.0
Wildlife	3.7	5.9
Knowledge Gained	0.7	1.1
Everything	2.7	4.2
Cleanliness	1.1	1.7
Bus Tours	2.3	3.7
TOTAL	100.0%	158.7%

Non-responses = 45

* Multiple responses allowed

Note: Totals may not add to 100.0% due to rounding.

6.5 What Tour Visitors Disliked About Waterton

In terms of dislikes (see Table 18) nearly one-third of respondents indicated there was nothing that displeased them. It should be noted that 43% of visitors surveyed did not respond to this question. The one major category of complaints (nearly 24% of respondents) related to the weather.

Other dislikes fell into a broad range of categories, none of which represent any substantial percentage of respondents. Despite this, those responsible for improving the various aspects of Park operations should note the following potential problem areas:

1. quality of food service
2. boat ride service
3. price levels
4. complaints concerning the Prince of Wales Hotel
5. lack of commercial services
6. lack of convenience amenities such as TV, radio, phone and bus service

Table 18
What Tour Visitors Liked Least About Waterton National Park

Item	(n = 227) % of Responses	% of Respondents
Nothing	30.8	32.6
Weather	22.5	23.8
Food Service	13.3	14.1
Vacation too Short	9.6	10.1
Boat Ride	4.6	4.8
Plumbing	2.5	2.6
Prices too High	5.0	5.3
Prince of Wales Rooms Too Hot	3.3	3.5
Lack of Commercial Services	4.6	4.8
Lack of TV, Radio, Phone	1.7	1.8
Bus	1.3	1.3
Too Commercial	.4	.4
Other	.4	.4
TOTAL	100.0%	105.7% *

Non-responses = 174

* Multiple responses allowed.

Note: Totals may not add to 100.0% due to rounding.

6.6 Suggestions for Improvements

Only 38% of surveyed visitors responded to this question. Of those, over half (55%) indicated that no improvements were necessary. Of those who did provide specific suggestions, the most important as measured by percentage of respondents were as follows:

1. need to modernize the Prince of Wales Hotel (7%)
2. provide for a longer stay (7%)
3. better transportation between the Prince of Wales Hotel and the townsite (5%)
4. more information concerning Waterton (5%)
5. more entertainment (3%)
6. better viewing areas (3%)

Many of the suggestions related to the quality, condition and operation of hotels, especially the Prince of Wales Hotel. This is a major concern which should be addressed by the owner and management of the Prince of Wales.

In addition, there were a number of minor suggestions as shown in Table 19.

Table 19
Suggestions for Improvements to the Park

(n = 151)

Item	% of Responses	% of Respondents
None	54.5	55.6
Modernize Prince of Wales	7.1	7.3
Lengthen Stay in Waterton	7.1	7.3
Better Transportation from Prince of Wales to Townsite	5.2	5.3
More Information	4.5	4.6
More Entertainment	2.6	2.6
Better Viewing Areas	3.2	3.3
Better Photo Store	1.9	2.0
TV & Radio	1.3	1.3
Cleaner Hotel Lobby	0.6	0.7
Bring Back Fish Hatchery	0.6	0.7
Phones	0.6	0.7
Free Ice in Hotel	1.3	1.3
More Laundry Facilities	0.6	0.7
Better Lighting	0.6	0.7
Zoo	1.3	1.3
Better Staff at Prince of Wales	1.3	1.3
TOTAL	100.0%	102.0% *

Non-responses = 250

* Multiple responses allowed.

Note: Totals may not add to 100.0% due to rounding.

6.7 Other Comments

Only 24% of those surveyed provided additional comments. Of those, nearly half simply stated that they enjoyed the tour. Another 22% commented on the beauty of the area and 23% on the excellent service. A further 24% expressed their appreciation for Canada and 9% indicated that they hoped to come back. Other minor comments which were put forth are summarized in Table 20.

Table 20
Other Comments Made By Respondents

(n = 141)

Item	% of Responses	% of Respondents
Enjoyed Trip	31.9	46.4
Beautiful Area	14.9	21.6
Excellent Service	15.6	22.7
Appreciate Canada	16.3	23.7
Hope to Come Back	6.4	9.3
Like Climate	2.1	3.1
Unknown Prior to Trip	2.1	3.1
Adventure More in U.S.	1.4	2.1
Appropriate Exchange Rate for U.S. Dollar	1.4	2.1
Enjoyed Bus Tours	0.7	1.0
Prince of Wales Needs Renovation	2.1	3.1
Boat Seats Too Close Together	0.7	1.0
Improve Travel from Prince of Wales Hotel to Townsite	0.7	1.0
Prices Fair	0.7	1.0
Poor Service	0.7	1.0
TOTAL	100.0%	145.4% *

Non-responses = 304

* Multiple responses allowed.

Note: Totals may not add to 100.0% due to rounding.

7.0 CONCLUDING REMARKS

The motorcoach survey was successful in obtaining responses from 401 motorcoach tour visitors. The results of this survey provided some interesting insights which will be helpful in developing a better product for this particular segment of the market and conducting promotions to attract more motorcoach tours. It is noted that the survey may underestimate some responses, since a major tour company from the United States did not fully cooperate in the administration of the survey. The highlights of the survey findings are:

1. An estimated 290 motorcoaches entered the Park during the period November 1, 1986 to October 31, 1987, based on a survey of accommodation and boat tour operators. This represents approximately 9,280 motorcoach visitors based on an average of 32 passengers per motorcoach.

2. Most of the motorcoach tours visit and stay overnight at the Prince of Wales Hotel.

3. The largest segment of respondents originated from Alberta (18%), followed by California (11%), New Jersey (7%), Florida (6%) and New York (6%). The typical passenger could be described as being a retired, well-educated person over the age of 55 whose household's annual income is over $40,000 Cdn.

4. Most of the visitors were on a vacation with their trip having an average of 10 nights away from home. Not all of these nights were necessarily spent on the motorcoach tour.

5. Most of the tours (54%) were purchased through a travel agent but over one-quarter (30%) were purchased directly from the tour operator. Over 52% of the respondents made their decision to go on their trip within three months of their departure. This indicates that

promotions targeted at tour operators and travel agents including trade shows and familiarization tours will likely yield the best results. The timing of the tour passengers decisions indicate that accommodation operators should maintain some flexibility in booking and payment for rooms by tour operators, especially those that are developing new packages.

6. The inclusion of Waterton Lakes National Park in a tour was important in the selection of the tour. Therefore, Waterton should be used as a feature attraction for tour packaging and promotions.

7. Given the length of trip and the origin of the motorcoach passengers, the one night stay was predominant. Efforts should be made to extend the length of stay during the day by packaging and promoting specific services and programs for motorcoach tours such as meal packages, box lunches, step-on guide service, meet and greet programs and receptions, and special events and interpretive services for tour groups.

8. The satisfaction level of motorcoach visitors is slightly higher than for all visitors surveyed during the Exit Survey.

9. The scenery is the big selling feature in the Park. Other selling features are the boat trip, friendly people, Prince of Wales Hotel and the Rockies.

10. The biggest deterrent to visitation may be the weather. It is very important that activities be planned for motorcoach tour passengers during inclement weather. Many passengers were quite satisfied with their stay in Waterton. Passengers suggested that improvements could be made in: food service, the boat ride, price levels, modernizing the Prince of Wales Hotel, commercial services, and amenities in hotel/motel rooms. There is also a need to provide better transportation service between the Prince of Wales Hotel and the townsite.

A P P E N D I X :

TOUR PASSENGER QUESTIONNAIRE

Serial No.: .....

Date: .....
Time: .....
Location: .....

WATERTON TOURISM STUDY

TOUR PASSENGER QUESTIONNAIRE

On behalf of the Governments of Canada and Alberta, the firm of Pannell Kerr Forster is conducting a survey of Motorcoach Tour Visitors to Waterton Lakes National Park. With your opinions, we hope to make the park a more interesting and enjoyable experience for visitors like yourself.

You are one of the few passengers on this motorcoach selected to answer this questionnaire. Your cooperation in taking a few minutes to complete this questionnaire will be greatly appreciated. Upon completion, please hand the questionnaire to the survey person waiting by your motorcoach. Your personal responses will be kept strictly confidential.

PLEASE PRINT OR WRITE CLEARLY!

ANSWER FOR YOURSELF ONLY.

1. Where is your regular place of residence?

_____	_____	_____
Community	Province/State	Country

If resident of Canada or U.S.A., what is your Postal or Zip Code?

Postal Code/Zip Code _____

2. What is the main purpose of this trip to Waterton Lakes National Park? Check (✓) all appropriate answers.

	(✓)
Attending a special meeting such as a convention, business meeting, workshop, retreat, conference	____
Vacation	____
Day-use recreation or social activities	____
Other (Please specify)_____	____

_____

3. Was stopping at Waterton Lakes National Park an important consideration in your selection of this tour?

   Yes _____ No _____

4. Where did you purchase this motorcoach tour? Check (✓) most appropriate response.

	(✓)
Travel Agent	____
Direct from Tour Operator	____
Through convention/conference/meeting organizer	____
Other (specify) _____	____

   _____

5. When did you make the final decision to go on this trip? Check (✓) most appropriate response

	(✓)
Within the past month	____
One to three months	____
Three to six months	____
Six months to a year ago	____
More than a year ago	____

6. Have you previously visited Waterton Lakes National Park?

   Yes _____ No _____

7. In your opinion, was the time allotted to visiting Waterton Lakes National Park: (Check (✓) one of the following)

   Too Short _____ About Right _____ Too Long _____

8. How would you rate your overall satisfaction with this visit to Waterton Lakes National Park? Check (✓) one of the following:

   Poor ____ Fair ____ Good ____ Excellent ____

9. What did you <u>like most</u> about this visit to Waterton Lakes National Park?

   _____

   _____

   _____

10. What did you <u>like least</u> about this visit to Waterton Lakes National Park?

_____

_____

_____

11. What additional or better attractions, facilities or services, if any, are needed in the park to improve <u>your</u> experience in the park?

_____

_____

_____

12. a) What expenses did <u>you</u> make in Waterton Lakes National Park on this tour, including credit card purchases, for each of the categories below? Expenses paid by another person or organization, such as the tour company, should not be included.

	$ Amount
1) Meals and refreshments bought in restaurants and hotels	_____
2) Groceries and beverages bought in stores	_____
3) Accommodation - hotel/motel, camping, cottage rental, etc.	_____
4) Recreation and entertainment such as boat rentals, movie admission, boat cruises, bike rentals, etc.	_____
5) Conference or convention registration fees	_____
6) Retail store purchases such as souvenirs, equipment, film, clothing, etc.	_____
7) All other goods and services	_____
ADD AMOUNTS TO CREATE TOTAL AMOUNT	_____

12. b) DID YOU RESPOND TO THE QUESTION ABOVE IN CANADIAN OR IN U.S. DOLLARS? (circle response)

$ Canadian _____ $ U.S. _____

13. On this <u>entire</u> trip (not just while you are on this tour), how many nights will you be away from home?

_____ nights

14. Which age category are you in? Check (✓) your age category.

	(✓)
0 to 5 years	____
6 to 15 years	____
16 to 19 years	____
20 to 24 years	____
25 to 34 years	____
35 to 44 years	____
45 to 54 years	____
55 to 64 years	____
65 to 74 years	____
75+ years	____

15. Which income category are you in? <u>Please indicate personal and household income before taxes</u>. Check (✓) the appropriate income categories.

		Total Personal Income (✓)	Total Household Income (✓)
Less than $10,000 Cdn.	(Less than $7,500 U.S.)	____	____
$10,000 to $19,999 Cdn.	($7,500 to $14,899 U.S.)	____	____
$20,000 to $29,999 Cdn.	($14,900 to $22,399 U.S.)	____	____
$30,000 to $39,999 Cdn.	($22,400 to $29,899 U.S.)	____	____
$40,000 to $49,999 Cdn.	($29,900 to $37,299 U.S.)	____	____
$50,000 to $59,999 Cdn.	($37,300 to $44,799 U.S.)	____	____
$60,000 to $69,999 Cdn.	($44,800 to $52,299 U.S.)	____	____
$70,00 + Cdn.	($52,300 + U.S.)	____	____

Definition of Household - People who live in the same dwelling including those not related or not part of the same family.

16. What is your occupation and the type of company or organization you work for?

_____ in _____

Type of Job — Type of Company/Organization

If not employed, are you (Check (✓) one):

- retired ____
- unemployed ____

17. Which education category are you in? Check (✓) the highest education level you have attained.

	(✓)
No formal education	____
Some grade school	____
Completed grade school	____
Some high school or secondary school (at least one year)	____
High school or secondary school graduate	____
Some vocational or technical school	____
Vocational or technical school graduate	____
Some university	____
University graduate	____
Post-graduate university	____

18. Are you male or female?

	(✓)
Male	____
Female	____

THANK YOU FOR YOUR HELP. If you have any other comments, either positive or negative, that you would like to make about your trip to Alberta, please use the space below. All responses will be treated in strict confidence.

_____

_____

_____

_____

_____

_____

_____

UPON COMPLETION OF THIS QUESTIONNAIRE, PLEASE HAND IT TO THE SURVEY PERSON.

06/23/87 V#4

FOR OFFICE USE ONLY

Corresponding Escort/Driver Questionnaire # _____

Crew Member Name: _____
No: _____

WATERTON TOURISM STUDY

. MOTORCOACH TOUR

ESCORT/DRIVER SURVEY

Prepared for:
Alberta Tourism

Prepared by:
Pannell Kerr Forster
in association with
J.R. Brent Ritchie, Ph.D.

March 1988

Revised Spring, 1990

WATERTON TOURISM STUDY
MOTORCOACH TOUR ESCORT/DRIVER SURVEY

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WATERTON TOURISM STUDY
MOTORCOACH TOUR ESCORT/DRIVER SURVEY

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1.0 INTRODUCTION

This survey is one of a series of surveys designed to supplement the Exit Survey of visitors to Waterton Lakes National Park conducted during the period of November 1, 1986 to October 31, 1987. The Exit Survey was designed to measure the perceptions, attitudes and behaviours of visitors to the Park. A separate report on the Exit Survey was prepared.

Because of the difficulty of stopping and interviewing visitors on motorcoach tours as part of the normal procedure in the Exit Survey, it was decided to conduct a separate survey of motorcoach visitors. At the same time, a survey of motorcoach tour drivers and escorts was conducted. The results of the motorcoach tour drivers and escorts survey are presented here. The results of the motorcoach visitors survey are presented in a separate report.

2.0 PURPOSE

The overall purpose of this survey was to provide additional information about the characteristics of motorcoach tours to Waterton Lakes National Park, the perceptions and satisfaction of the motorcoach tour escorts or drivers, and a profile of group tour operators through motorcoach tour escorts and drivers.

3.0 METHODOLOGY

The detailed methodology for the motorcoach survey is explained in the report titled, "Survey of Motorcoach Visitors". For each of the 85 motorcoach tours surveyed, the escort or driver (when there was no tour escort) was asked to complete an Escort/Driver Questionnaire (Appendix). A total of 72 questionnaires were completed. The other 13 escorts or drivers refused to complete the questionnaire due largely to time restrictions as their first priority was their passengers.

Due to the small number of questionnaires and the emphasis on qualitative information (open-ended responses and comments), the responses were manually tabulated.

4.0 RESULTS AND OBSERVATIONS

The tabulated results of the survey and observations are presented in the order as asked in the questionnaire.

4.1 Location of Tour Company Offices

Table 1 shows the distribution and the location of tour company offices as indicated by the escorts and drivers responding to the survey. Nearly three-quarters of the respondents' offices were in the United States. The most frequent location was Connecticut followed by California. Centres in Alberta other than Edmonton or Calgary were the most popular locations of offices in Canada. Noticeably absent are tour companies from Manitoba and Ontario.

Table 1
Location of Tour
Company Offices

(n=69)

LOCATION	NO.		%	
Canada				
Alberta - Calgary	4		5.8	
Alberta - Edmonton	3		4.3	
Alberta - Other Alberta	6		8.7	
Quebec	3		4.3	
Saskatchewan and B.C.	2	18	2.9	26.1%
U.S.A.				
California	8		11.6	
Connecticut	11		15.9	
Iowa	2		2.9	
Louisiana	2		2.9	
Minnesota	6		8.7	
Montana	5		7.3	
Ohio	2		2.9	
Pennsylvania	2		2.9	
Utah	4		5.8	
Washington	2		2.9	
Wisconsin	2		2.9	
Other States	5	51	7.3	73.9%
	69		100.0%	

Non-responses = 3

Note: Totals may not add to 100.0% due to rounding.

4.2 Tour Names

As shown in Table 2, most tour names highlighted the Canadian Rockies, National Parks and the Pacific Northwest. "Canadian Rockies" was most frequently mentioned in the tour names at 27.

Table 2
Tour Names

(n=67)

Tour Name	No.
National Parks of the Rockies	1
Retired Group Tours	1
Canadian Rockies & Pacific Northwest Tour	2
Canadian Rockies	9
Prince of Wales Circle	4
Calgary Tour	1
Calgary and Canadian Rockies	2
Pacific Northwest	3
Western Canada & Pacific Northwest	1
Banff & Canadian Rockies	1
Glacier National Park	5
Northwest Parks	3
Canadian Rockies & Glacier National Parks	1
Canadian Rockies & Glacier Park	12
Canada Plus	1
Away to Alaska	1
Waterton Day Tour	1
Waterton Lakes Tour	2
Great Western Adventure Tour	3
Waterton Lakes Golf Tour	1
Drumheller, Strathmore, Waterton, Fort McLeod and Calgary	1
Group Name	8
Corporate Tour Company Name	3
	67

Non-responses = 5

4.3 Description of Tour Passengers

Tour passengers travel primarily in seniors groups or as individual travellers buying into a larger tour as shown in Table 3. In most cases, the seniors groups were from Alberta and nearby states and provinces. Tours booking individual travellers were comprised primarily of Americans with a very small proportion from other countries as determined from the survey of motorcoach passengers.

Table 3
Description of Tour Passengers

(n=70)

Description	No.	%
Individual Travellers	32	45.7
Seniors Group	33	47.1
Club or Association Group	2	2.9
Convention or Conference Group	2	2.9
Other	1	1.4
	70	100.0%

Non-responses = 2

4.4 Number of Nights Away During Tour

Table 4 presents the distribution of the number of nights away during the motorcoach tour. The most frequent response was eight nights indicated by twelve tours. The average number of nights away during the tour is also approximately eight nights.

Table 4
Number of Nights Away During Tour

(n=66)

No. of Nights	No.	%
1 - 5 nights	16	24.2
6 - 10 nights	21	31.8
11 - 15 nights	22	33.3
16 - 20 nights	6	9.1
21 - 29 nights	1	1.5
	66	100.0%

Most frequent response: 8 nights by 12 tours
Non-responses = 6

Note: Totals may not add to 100.0% due to rounding.

4.5 Number of People on Tour

The distribution of the number of people on the tours is shown in Table 5. The number of people on the tours ranged from seven to 70 with an average of 32. The most frequent response was 44.

Table 5
Number of People on Tour

(n=70)

No. of People	No.	%
6 - 10	3	4.3
11 - 15	4	5.7
16 - 20	4	5.7
21 - 25	8	11.4
26 - 30	7	10.0
31 - 35	10	14.3
36 - 40	4	5.7
41 - 45	25	35.7
46 - 50	4	5.7
51 - 70	1	14.3
	70	100.0%

Range: 7 to 70
Average: 32
Most Frequent Response: 44
Non-responses = 2

Note: Totals may not add to 100.0% due to rounding.

4.6 Origin of Tour

Thirty-two of the 67 tours commenced in Canada. Only two of these tours commenced outside of Alberta. The most mentioned point of origin was Calgary. The most frequently mentioned origins of tours from the United States were California and Montana. Only seven of the tours did not return to the same point of origin.

Table 6
Origin of Tour

(n=67)

PROVINCE/STATE	COMMUNITY	RETURN (R) *	NO.	
Alberta	Calgary	R	22	
Alberta	Camrose	R	1	
Alberta	Edmonton	R	3	
Alberta	Lethbridge	R	3	
Alberta	Rocky Mountain House	R	1	
British Columbia	Kimberly	R	1	
Saskatchewan	Fort Qu'Appelle	R	1	32
Alaska	Anchorage		1	
California	Palm Springs	R	1	
California	Petaluma	R	1	
California	Redding	R	1	
California	San Diego	R	1	
Florida	Panoma	R	1	
Florida	Satellite Beach	R	1	
Idaho	Pocatello	R	1	
Illinois	Chicago	R	4	
Louisiana	New Orleans	R	2	
Minnesota	St. Paul	R	1	
Mississippi	Meridian	R	1	
Missouri	St. Louis	R	1	
Montana	East Glacier		2	
Montana	East Glacier	R	1	
Montana	Great Falls		1	
Montana	Helena		1	
Pennsylvania	Hanover	R	1	
Texas	Grand Prairie	R	1	
Utah	Orim	R	1	
Utah	Salt Lake City	R	2	
Utah	Spanish Fork	R	1	
Washington	Seattle		2	
Washington	Seattle	R	3	
Wisconsin	Milwaukee	R	2	35
				67

* R = Tour ended at same point of origin

Non-responses = 5

4.7 Points of Entry and Exit into Alberta

The Chief Mountain Border Crossing between Montana and Alberta and the Calgary Airport were the most frequent points of entry into Alberta with 22 and 17 entries, respectively, as shown in Table 7. Eighty-one percent (81%) of the tours surveyed entered Alberta at these two points.

Table 7
Point of Entry into Alberta

(n=48)

Point of Entry	No.	%
Calgary Airport	17	35.4
Chief Mountain	22	45.8
Highway 16 Yellowhead Pass	3	6.2
Kicking Horse Pass, Highway 1	1	2.1
Sweetgrass	1	2.1
Crowsnest, Highway 3 (B.C.)	2	4.2
Medicine Hat	1	2.1
British Columbia	1	2.1
	48	100.0%

Non-responses or not applicable = 24

The Chief Mountain Border Crossing and the Calgary Airport were also the most common points of exit from Alberta. There was a higher number of tours exiting the province into British Columbia (8) than entering the province from British Columbia (3) as shown in Table 8 compared to Table 7.

Table 8
Point of Exit from Alberta

(n=43)

Point of Exit	No.	%
Calgary Airport	11	25.6
Chief Mountain	21	48.8
Crowsnest, Highway 3 (B.C.)	2	4.7
Yellowhead Highway	1	2.3
British Columbia	6	14.0
Medicine Hat	1	2.3
Highway 95	1	2.3
	43	100.0%

Non-responses or not applicable = 29

These results stress the importance of promoting tour itineraries using major international gateways. The importance of keeping the Chief Mountain border open for a longer period to promote shoulder season tours is also supported by these results.

4.8 Nights Spent in Alberta

Table 9 shows the distribution of the number of nights spent in Alberta. More than 90% of the tours over-nighted in Alberta. The average number of nights of those spending one or more nights in Alberta was 3.9.

Table 9
Nights Spent in Alberta

(n=72)

No. of Nights	No.	%
0 nights	7	9.7
1 night	15	20.8
2 nights	3	4.2
3 nights	5	6.9
4 nights	14	19.4
5 nights	12	16.7
6 nights	13	18.1
7 nights	1	1.4
8 nights	1	1.4
11 nights	1	1.4
	72	100.0%

Average No. of Nights - All Tours: 3.6 nights
Average No. of Nights - 1+ Night Tours Only: 3.9 nights

4.9 Nights Spent in Waterton

Nearly 74% of the tours spent one or more nights in Waterton. The average number of nights for tours spending one or more nights in Waterton was 1.2.

Table 10
Nights Spent in Waterton

(n=72)

No. of Nights	No.	%
0 nights	19	26.4
1 night	45	62.5
2+ nights	8	11.1
	72	100.0%

Average No. of Nights - All Tours: 0.8 nights
Average No. of Nights - 1+ Night Tours Only: 1.2 nights

Table 11 provides a breakdown of the length of stay in Waterton in hours and days. The average length of stay for all tours was 0.9 days. The most frequent responses were 11 for two hours and 12 for one day. It is significant to note that nearly 28% spent six or less hours in Waterton. Almost 28% of the tours spent 13 to 18 hours in the Park, often staying overnight with a minimum amount of time for sightseeing.

Table 11
Length of Stay in Waterton

(n=72)

Hours	No.		%	
1 to 6	20		27.8	
7 to 12	0		0.0	
13 to 18	20		27.8	
19 to 24	12	52	16.7	72.3%
Days				
1	12		16.7	
2	7		9.7	
5	1	20	1.4	27.8%
	72		100.0%	

Average Length of Stay: 20.7 hours or 0.9 days

Most frequent responses: 11 responses with 2 hours and 12 responses with 1 day

Note: Escorts/drivers were asked to indicate length of stay in hours if less than 24 hours and in days if more than 24 hours.

Totals may not add to 100.0% due to rounding.

4.10 Places/Number of Nights Spent in Alberta

Table 12 shows the distribution of the communities and the average number of nights that tours to Waterton stayed in Alberta. The townsite of Waterton was the most frequently mentioned community in Alberta at 53 or 73.6% of the respondents. Banff was the second most often mentioned community. It also had the highest average number of nights spent in Alberta at 1.8. Other frequented overnight spots in Alberta were Calgary, Jasper and Lake Louise.

Table 12
Places/Number of Nights Spent in Alberta

(n=72)

Community/Place	Average No. of Nights	No. of Responses	% of Responses	% of Respondents
Waterton	1.2	53	26.9	73.6
Banff	1.8	37	18.8	51.4
Calgary	1.4	33	16.8	45.8
Jasper	1.5	31	15.7	43.1
Lake Louise	1.1	23	11.7	31.9
Lethbridge	1.0	3	1.5	4.2
Ice Fields	1.0	2	1.0	2.8
Pincher Creek	1.5	2	1.0	2.8
Canmore	1.0	2	1.0	2.8
Edmonton	1.0	2	1.0	2.8
Drumheller	1.0	2	1.0	2.8
Fort Macleod	1.0	2	1.0	2.8
Red Deer	1.0	1	0.5	1.4
Grande Prairie	1.0	1	0.5	1.4
Fairmont Hot Springs	1.0	1	0.5	1.4
Seebee	1.0	1	0.5	1.4
Strathmore	1.0	1	0.5	1.4
		197	100.0%	

Note: Totals may not add to 100.0% due to rounding.
Multiple responses allowed.

4.11 Events/Attractions as Part of Tour

The shoreline boat cruise and general sightseeing were the most popular events/attractions visited in Waterton Lakes National Park. Table 13 also shows the most popular events and attractions visited in other communities in Alberta. General sightseeing was popular in Banff National Park, Fort Macleod, Lake Louise and on the Icefields Parkway. The most popular attractions outside of Waterton Lakes National Park were the snowcoach ride on the Columbia Icefields (9.2%), the Sulphur Mountain Gondola in Banff (7.1%), and the Head-Smashed-In Buffalo Jump Interpretive Centre near Fort Macleod (3.7%). In responding to this open-ended question, the escorts and drivers identified only one event, the Calgary Stampede (4.2%).

Table 13
Events/Attractions Visited as Part of Tour

(n=72)

EVENT/ATTRACTION	LOCATION	NO. OF RESPONSES	% OF RESPONSES
Sightseeing in Waterton Park	Waterton	12	5.0
Cameron Lake/Falls	Waterton	5	2.1
Shoreline Boat Cruise	Waterton	24	10.0
Red Rock Canyon	Waterton	3	1.3
Prince of Wales Hotel	Waterton	4	1.7
Heritage Centre	Waterton	3	1.3
Marina	Waterton	1	0.4
Sightseeing Banff Park	Banff	22	9.2
Sulphur Mountain Gondola	Banff	17	7.1
Lake Moraine	Banff	5	2.1
Radium Hot Springs	Banff	3	1.3
Bow Falls	Banff	3	1.3
Banff Spring Hotel	Banff	4	1.7
Buffalo Paddock	Banff	2	0.8
Cascade Garden	Banff	1	0.4
Sightseeing Jasper Park/Lodge	Jasper	9	3.7
Jasper Tramway	Jasper	1	0.4
Athabasca Falls	Jasper	3	1.3
Maligne Lake/Boat Cruise	Jasper	2	0.8
Sightseeing Fort Macleod	Fort McLeod	15	6.2
Head-Smashed-In Buffalo Jump	Fort McLeod	9	3.7
Sightseeing Lake Louise/Chateau	Lake Louise	18	7.5
Yoho Valley	Lake Louise	2	0.8
Remington Carriages	Cardston	5	2.1
Blood Indian Reserve	Cardston	1	0.4
Mormon Temple	Cardston	1	0.4
Sightseeing Calgary	Calgary	5	2.1
Stampede	Calgary	10	4.2
Heritage Park	Calgary	3	1.3
Calgary Tower	Calgary	2	0.8
Calgary Olympic Centre	Calgary	1	0.4
Snowcoach Ride/Sightseeing	Columbia Ice-fields	22	9.2
Sightseeing Icefields Parkway	Icefields	12	5.0
Frank Slide	Frank	5	2.1
Buffalo Paddock	Pincher Creek	1	0.4
Tyrrell Museum/Sightseeing	Drumheller	1	0.4
Japanese Gardens	Lethbridge	3	1.3
		240	100.0%

Note: Totals may not add to 100.0% due to rounding.
Multiple responses allowed.

4.12 Attractions Visited in Waterton

Escorts and drivers indicated that the attractions visited most often in Waterton were the Prince of Wales Hotel (28.5%), Cameron Falls (17.4%), Marina (11.6%), Goat Haunt (8.2%), Buffalo Paddock (7.2%), and the Heritage Centre on Main Street (6.3%).

Table 14
Attractions Visited in Waterton

(n=72)

ATTRACTION	NO. OF RESPONSES	% OF RESPONSES	% OF RESPONDENTS
Buffalo Paddock	15	7.2	20.8
Prince of Wales Hotel	59	28.5	81.9
Cameron Falls	36	17.4	50.0
Cameron Lake	8	3.9	11.1
Kootenai Brown's Grave	3	1.5	4.2
Red Rock Canyon	8	3.9	11.1
Goat Haunt	17	8.2	23.6
Oil City Historical Cairn	3	1.5	4.2
Peace Park Pavilion	3	1.5	4.2
Golf Course	1	0.5	1.4
Heritage Centre on Main Street	13	6.3	18.1
Marina	24	11.6	33.3
Other	8	3.9	11.1
Did not visit any attractions	1	0.5	1.4
Other: Church Service	1	0.5	1.4
Other: Boat Cruise	6	2.9	8.3
Other: Visit Archaeological Sites	1	0.5	1.4
	207	100.0%	

Note: Totals may not add to 100.0% due to rounding.

Multiple responses allowed.

4.13 Facilities/Programs Passengers Used Together in Waterton

As shown in Table 15, the most popular facility used by the passengers as a tour group was the Scenic Boat Tour with 41% of the responses. The next highest response was "Did not use any facilities or participate in programs" together as a tour group (16.8%). This indicates that for the most part tour groups were on their own, stayed a short time in Waterton or tended to frequent facilities or programs that did not have an admission charge. This is not uncommon for most tour companies since they tend to feature only one attraction as part of the overall tour package at a stop for one day in order to keep the price of the tour to a minimum.

Table 15
Facilities/Programs Passengers Used Together in Waterton
(n=70)

ATTRACTION	NO. OF RESPONSES	% OF RESPONSES	% OF RESPONDENTS
Hiking Trails	2	2.1	2.9
Interpretive and Educational Programs	8	8.4	11.4
Park Information Centre	10	10.5	14.3
Horseback Riding Stables	2	2.1	2.9
Golf Course	2	2.1	2.9
Bicycle/Scooter Rentals	1	1.1	1.4
Boat/Canoe Rentals	2	2.1	2.9
Scenic Boat Tour	39	41.0	55.7
Convention Centre	4	4.2	5.7
Swimming Pool	3	3.2	4.3
Other	3	3.2	4.3
Did not use any facilities or participate in programs	16	16.8	22.9
Other: Bayshore Inn	1	1.1	1.4
Other: Lunch at Prince of Wales Hotel	2	2.1	2.9
	95	100.0%	

Non-responses = 2

Note: Totals may not add to 100.0% due to rounding.

Multiple responses allowed.

4.14 Visit Glacier National Park in Montana

Table 16 shows that over 71% of the tours visited Glacier National Park in Montana as part of the tour. This is important in marketing Waterton as part of the Waterton-Glacier International Peace Park.

Table 16
Visit Glacier National Park in Montana as Part of Tour

(n=70)

	No.	%
Yes	50	71.4
No	20	28.6
	70	100.0%

Non-responses = 2

4.15 Passengers' Satisfaction Rating - Rated by Escort/Driver

Table 17 shows the passengers' satisfaction rating as rated by the escort or driver. The overall ratings are very similar to the ratings given by the passengers. Two of the 394 passengers surveyed gave a poor rating concerning their satisfaction level with their visit to Waterton compared to none of the tour escorts or drivers. However, 14.1% of the tour escorts and drivers rated the satisfaction level as fair compared to 5.1% of the passengers. In interpreting these results, it should be noted that escorts and drivers are generally more travelled so their rating is likely more comparative to other tours.

Table 17
Passengers' Satisfaction Rating - Rated by Escort/Driver

(n=64)

Rating	No.	%
Poor	0	0.0
Fair	9	14.1
Good	27	42.2
Excellent	28	43.7
	64	100.0%

Non-responses = 8

4.16 Passengers Liked Most - Rated by Escort/Driver

For the most part, the responses by the escorts and drivers about what they liked most during their visit to Waterton were very similar to responses of the passengers. There was one item that was noticeably different. The escorts and drivers rated the Prince of Wales Hotel visit, meal or view much higher than the passengers. The most appealing aspects of the tour as rated by the escorts and drivers were the scenery, Prince of Wales Hotel, boat cruise and the natural beauty of the Park.

Table 18
Passengers Liked Most - Rated by Escort/Driver

(n=60)

	NO. OF REPONSES	% OF RESPONSES	% OF RESPONDENTS
Scenery/Topography/Location	31	28.2	51.7
Prince of Wales Hotel/Meal/View	23	20.9	38.3
Boat Cruise	17	15.4	28.3
Natural Beauty/Mountains/Lakes	10	9.1	16.7
Wildlife	6	5.5	10.0
Cameron Falls/Lake	4	3.6	6.7
Atmosphere/Friendliness	3	2.7	5.0
Weather	3	2.7	5.0
Quietness	2	1.8	3.3
Accommodation	2	1.8	3.3
Food/Service	2	1.8	3.3
Gift Shops/Shopping	2	1.8	3.3
Lunch at Bayshore	1	0.9	1.7
Welcome Reception	1	0.9	1.7
Golf Course	1	0.9	1.7
Swimming	1	0.9	1.7
Everything	1	0.9	1.7
	110	100.0%	

Non-responses = 12

Note: Totals may not add to 100.0% due to rounding.

Multiple responses allowed.

4.17 Passengers Liked Least - Rated by Escort/Driver

Only 22 escorts or drivers responded to this question compared to 60 respondents to the question about what passengers liked most. Four "likes" were mentioned for every one "dislike". The escorts and drivers indicated that weather and not enough time in the Park were the items that the passengers liked least about their visit to Waterton. Other dislikes related to service, quality and prices at the Prince of Wales Hotel. A lunch or dinner delay was mentioned by 10.3% of the escorts and drivers. The most frequently mentioned dislikes are quite similar to those mentioned by the passengers in the Survey of Motorcoach Visitors.

Table 19
Passengers Liked Least - Rated by Escort/Driver

(n=22)

	NO. OF RESPONSES	% OF RESPONSES	% OF RESPONDENTS
Weather	10	34.5	45.4
Not enough time in the Park	5	17.2	22.7
Food/service in restaurants	1	3.4	4.6
Lunch or diner delay	3	10.3	13.6
Unavailability of Entertainment at Prince of Wales Hotel	2	6.9	9.1
Food price at Prince of Wales Hotel	1	3.4	4.6
Cleanliness/food quality at Prince of Wales Hotel	1	3.4	4.6
Hotel too expensive	1	3.4	4.6
Motel not up to par	1	3.4	4.6
Prices too high in stores	1	3.4	4.6
Lack of choice of restaurants	1	3.4	4.6
Unable to travel from Prince of Wales Hotel to townsite (on bus)	1	3.4	4.6
No place to swim	1	3.4	4.6
	29	100.0%	

Non-responses = 50

Note: Totals may not add to 100.0% due to rounding.
Multiple responses allowed.

Only 15 of the 72 escorts and drivers surveyed indicated additional or better facilities were required to improve the tour in Waterton (Table 20). No one suggestion received more than three mentions. However, there were several suggestions applicable to the Prince of Wales Hotel.

Table 20
Additional/Better Facilities Required to Improve Tour

(n=15)

	NO. OF RESPONSES	% OF RESPONSES	% OF RESPONDENTS
Shuttle from Prince of Wales Hotel to town	3	16.7	20.0
Provide guides for buses	2	11.1	13.3
Better ventilation/air conditioning in hotels/restaurants	2	11.1	13.3
Walking path from Prince of Wales Hotel to town	2	11.1	13.3
Bike lanes on roads	1	5.6	6.7
Earlier breakfast	1	5.6	6.7
Upgrade Prince of Wales Hotel	1	5.6	6.7
Greet travellers	1	5.6	6.7
Vending machines (soft drink)	1	5.6	6.7
More lodgings	1	5.6	6.7
More complete drug store	1	5.6	6.7
Don't commercialize any further	1	5.6	6.7
	18	100.0%	

Non-responses = 57

Note: Totals may not add to 100.0% due to rounding.

Multiple responses allowed.

4.18 Price of Tour

Table 21 shows the distribution of tour prices based on the responses from the escorts and drivers. The lowest price was $63 and the highest price was $3,202 with an average price of $1,307. Given that eight nights was the average length of a tour, the average price of the tour per night was $163.

Table 21
Price of Tour

(n=46)

PRICE IN CANADIAN DOLLARS	NO. RESPONSES	% OF RESPONDENTS
Less than $300	10	21.7
301 to 900	4	8.7
901 to 1,200	4	8.7
1,201 to 1,500	5	10.9
1,501 to 1,800	13	28.3
1,801 to 2,100	3	6.5
2,101 to 2,400	4	8.7
2,401 to 2,700	1	2.2
2,701 to 3,000	1	2.2
More than 3,000	1	2.2
	46	100.0%

Minimum: $63
Maximum: $3,202
Average: $1,307

Non-responses = 26

4.19 Interested in Receiving Information

Fifty percent of the respondents indicated an interest in receiving more information on Waterton Lakes National Park. A name and telephone number was obtained. The list of those escorts/drivers requesting more information is included in the Appendix.

4.20 Other Comments

Several of the escorts and drivers provided additional comments about their tour visit to Waterton. Most of the comments were very positive. The comments by the respondents were as follows:

- Waterton is a beautiful area. It is a shame there is no first class accommodation.
- Everyone was extremely polite and helpful. The crew aboard the ship was fabulous as well as staff at Goat Haunt. Hotel staff were exceptionally helpful. The townsite itself was spotless and everyone was friendly.
- I would like to thank Travel Alberta for their professionalism and their concerns about tourism. Especially pleased with Alberta Culture at Frank Slide.
- Well satisfied with the whole trip.
- Please keep it as it is. It is one of our most favourite places to visit. We've been here 3 times. Canada is wonderful.
- I feel that everything went great and the people enjoyed themselves.
- Absolutely loved the Canadian Rockies.
- All of our local guides were friendly, informative and competent. Each displayed a great deal of national pride. All of the attractions which we visited were well maintained and staffed, which made our visit very pleasant. The scenery is magnificent.
- I have done this tour 10 times and everytime it gets better. The buildings have greatly improved.
- Customs hassled our drivers.
- Great country.
- We always have a good time in Alberta.
- We appreciate the Info Centre and their friendly staff.
- It's always great to come to Waterton. I have no problem selling this part of the tour.
- Found your Visitors Guide helpful.

5.0 CONCLUDING REMARKS

The survey of motorcoach tour escorts and drivers was successful in obtaining information about tour characteristics, assessments of the quality and level of service provided for their tours during their stay in Waterton, and information about other attractions visited while in Alberta. Of 85 motorcoach tours surveyed, 72 escorts or drivers completed an escort/driver questionnaire. The results of this survey provide interesting insight that will be helpful in developing a better product and conducting more effective promotions to attract more motorcoach tours. The highlights of the survey findings are as follows:

1. The results indicate that direct marketing to seniors groups and tour companies would likely prove most effective in attracting more tours to Waterton. However, it appears that pinpointing tour companies through associations such as the National Tour Association and the American Bus Association would be more effective in marketing efforts to secure more tours from outside of Canada. This assumes that general consumer promotions about Alberta and Waterton by Alberta Tourism and tourist associations continue.

2. By making the tour companies more aware of the attractions, facilities and programs available in the Park, there is an opportunity to increase the length of stay in Waterton. The length of stay may not increase the number of nights that each group stays in Waterton but will increase the length of stay during daytime hours and likely result in an additional meal or two being purchased in Waterton.

3. Many of the tours fly into international gateways and feature the Canadian Rockies, National Parks and the Pacific Northwest in their tours. In promoting tours to Waterton, it would be appropriate to include suggested itineraries from the major international gateways of Calgary, Vancouver, Salt Lake City and Seattle.

4. At present, the Chief Mountain border crossing is only open from mid-May to mid-September. This restricts the opportunity to expand

the number of tours in the shoulder seasons, especially those tours which feature the Canadian and American Rocky Mountains.

5. Most of the tours feature visits to Banff, Calgary or Jasper. At present, there is little cooperative marketing with the tourist associations in these areas. There is an excellent opportunity to expand the cooperative marketing with these associations, especially for tours.

6. Many of the least liked elements of their visit to Waterton and suggestions for improvement pertain to the level of service provided in hotels and restaurants. This issue should be a high priority for the community and the owners and managers of hotels and restaurants.

7. In most instances, the ratings of service and suggestions for improvement by the escorts and drivers were similar to the passengers' ratings and suggestions (see Survey of Motorcoach Visitors). In order to gauge the performance of Waterton's tourism industry and progress in making improvements, it would be appropriate to survey the escorts and drivers on an annual basis. A randomly selected survey of 40 to 50 escorts and drivers surveyed on an annual basis would be sufficient to provide input into the evaluation of Waterton's progress. This survey is also important in showing the customers (tour companies) that Waterton's tourism industry cares and that action is taken on items of concern to them.

8. Most of the motorcoach tour passengers are seniors. A number of the suggestions made by the escorts and drivers indicate a need to customize facilities and services to meet the needs of this group in order to make their stay in Waterton more comfortable ie. shuttle service from Prince of Wales Hotel to the townsite, more complete drugstore, better ventilation and air conditioning in hotels and restaurants, etc.

A P P E N D I X :

QUESTIONNAIRE

Serial No.: .....

Date: .....
Time: .....
Location: .....

WATERTON TOURISM STUDY

MOTORCOACH ESCORT/DRIVER QUESTIONNAIRE

Your motorcoach has been randomly selected to respond to this important survey of motorcoach tours or groups visiting Waterton Lakes National Park. Your responses are important to the future of tourism in the Park. Please complete this questionnaire and encourage the selected passengers to complete their questionnaires.

The results will be tabulated by the firm of Pannell Kerr Forster, Management Consultants. Your personal responses will be kept strictly confidential.

PLEASE PRINT OR WRITE CLEARLY!

1. What is the full name and address of your company or organization?

   Name: _____

   Street Address: _____

   Community and Province/State: _____

   Country: _____

   Postal/Zip Code: _____

2. What is the name or title of this particular tour?

   _____

3. What is the name of this group?

   Group Name: _____

   Check (√) here if not applicable _____

4. Which category <u>best</u> describes the tour passengers travelling on this motorcoach?

	(√)
Individual travellers	____
Seniors Group	____
Student Group	____
Club or Association Group	____
Convention or Conference Group	____
Business Group	____
Family Group	____
Other (Specify) _____	____
_____	

5. How many nights is the duration of this tour?

_____ nights

6. What was the date this tour began?

Date: _____

7. What is the date this tour will end?

Date: _____

8. How many people, excluding yourself and the driver, are on this tour?

_____ people

9. Where did the tour begin (main point of origin for this tour)?

_____	_____	_____
Community	Province/State	Country

10. Where will the tour end? If same as point of origin, please state so.

_____	_____	_____
Community	Province/State	Country

11. At what specific place did you enter Alberta on this tour?

_____

(Write in highway location/airport/border crossing/train station or bus depot)

Check (✓) here if not applicable _____

12. At what specific place will you exit Alberta on this tour?

_____

(Write in highway location/airport/border crossing/train station or bus depot)

Check (✓) here if not applicable _____

13. On this tour, how many nights will be spent in Alberta?

_____ nights

14. On this tour, how many nights will be spent in Waterton Lakes National Park?

_____ nights

15. On this tour, how many hours or days will be spent in Waterton Lakes National Park?

_____ hours (if less than 24 hours)

_____ days (if more than 24 hours)

16. Please identify the places and number of nights at each stop in Alberta.

	Name of Community/Place in Sequence	Number of Nights
First Stop in Alberta	_____	_____
Second Stop in Alberta	_____	_____
Third Stop in Alberta	_____	_____
Fourth Stop in Alberta	_____	_____
Fifth Stop in Alberta	_____	_____
Sixth Stop in Alberta	_____	_____

17. What attractions, events and activities have been included as part of this tour in Alberta?

Name of Attraction/Event or type of Activity	Location in Alberta

Check (√) here, if you will not visit any other attractions or events or participate in activities outside of Waterton Lakes National Park. ____

18. Which of the attractions listed below did your tour passengers visit together while in Waterton Lakes National Park?

	(√)
Buffalo Paddocks	
Prince of Wales Hotel	
Cameron Falls	
Cameron Lake	
Kootenai Brown's Grave	
Red Rock Canyon	
Goat Haunt	
Oil City Historical Cairn	
Peace Park Pavilion	
Golf Course	
Heritage Centre on Main Street	
Marina	
Other: _____	
Did not visit any attractions	

19. Which of the facilities and programs listed below did your tour passengers use or participate in <u>together</u> while in Waterton Lakes National Park?

	(✓)
Hiking Trails	____
Interpretive and Educational Programs	____
Park Information Centre	____
Horseback Riding Stables	____
Golf Course	____
Bicycle/Scooter Rentals	____
Boat/Canoe Rental	____
Scenic Boat Tour	____
Church Camp	____
Convention Centre	____
Swimming Pool	____
Other: _____	____
Did not use any facilities or participate in programs	____

20. Will this tour visit Glacier National Park in Montana while on this tour? Please exclude the visit to the Park during the scenic boat tour, if applicable.

Yes _____ No _____

21. How would you rate the passengers' overall satisfaction with this visit to Waterton Lakes National Park relative to the rest of the tour?

Poor ____ Fair ____ Good ____ Excellent ____

22. From your perspective as the tour escort or driver, what did your tour passengers <u>like most</u> about this visit to the park?

_____

_____

_____

23. From your perspective as the tour escort or driver, what did your tour passengers <u>like least</u> about this visit to the park?

_____

_____

_____

24. What additional or better attractions, facilities or services, if any, are needed in the park to improve the tour experience?

_____

_____

_____

25. What was the price of the tour per passenger based on double occupancy?

$ _____ Cdn. or U.S. (circle one)

26. Would your company or organization be interested in receiving more information about attraction, events and activities in Waterton Lakes National Park and the surrounding area?

Yes _____ No _____

If yes, who is the main contact person and their telephone number?

Name of Contact: _____

Telephone Number: _____ _____
Area Code Number

27. **Thank you for your help.** If you have any other comments, either positive or negative, that you would like to make about your trip in Alberta, please use the space below.

_____

_____

_____

_____

_____

_____

_____

PLEASE HAND YOUR COMPLETED QUESTIONNAIRE TO THE SURVEY PERSON. YOUR ASSISTANCE IN COLLECTING COMPLETED QUESTIONNAIRES FROM YOUR PASSENGERS AND HANDING THEM TO THE SURVEY PERSON IS GREATLY APPRECIATED.

04/15/87

FOR OFFICE USE ONLY

Corresponding Passenger Questionnaires: _____ _____ _____

_____ _____ _____

Crew Member Name: _____

No: _____

WATERTON TOURISM STUDY

INDICATOR SURVEY OF PRIMARY MARKETS

Prepared for:

Alberta Tourism

Prepared by:

J.R. Brent Ritchie, Ph.D.
In Association with
Pannell Kerr Forster

January 1988

Revised Spring, 1990

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1.0 INTRODUCTION

This survey is one of several smaller research projects designed to support the major Exit Survey conducted at Waterton Lakes National Park during the period November 1, 1986 to October 31, 1987. Because it plays only a supporting role, this survey is referred to as an "indicator". This terminology is meant to clearly communicate that the results, while extremely useful as an indication of respondent views, are not as statistically reliable as would be obtained from a more rigorously conducted full scale survey.

2.0 PURPOSE AND OBJECTIVES

The overall purpose of this survey was to provide a basic understanding of selected attitudes and behaviours of residents in primary markets concerning the "Waterton Experience" and related competition issues. Specifically, the research sought to fulfill five main objectives:

- to measure the frequency of visitation to national/provincial (state) parks during the past 3 years;
- to measure existing levels of awareness of selected Canadian National Parks;
- to provide a detailed profile of respondent attitude and behaviours concerning Waterton National Park;
- to measure the extent of visitation to selected places and attractions in Alberta and to Glacier National Park; and
- to examine the extent of possible differences in attitudes and behaviours of respondents
    - a) from different geographic locations; and
    - b) having different socio-demographic characteristics.

As an indicator survey, 75 completed interviews in each community was the target for completion of the survey.

3.0 METHODOLOGY

Telephone surveys were conducted in four selected markets, namely:

- Calgary
- Medicine Hat
- Lethbridge
- Great Falls, Montana

These communities were selected because they are the major population centres within close proximity (less than 3 1/2 hours drive) to Waterton Lakes National Park.

As shown on Table 1, between 71 and 81 interviews were completed at each location.

The questionnaire employed in the survey is attached as Appendix I. The survey was conducted during the period August 6, 1987 to October 29, 1987. Most of the Calgary interviews were conducted in August. Medicine Hat and Lethbridge interviews were conducted in August and September. The Great Falls interviews were started in September with most of them completed in October.

Residential telephone listings were randomly selected from the most current telephone directory for each centre. Calls were placed at different times throughout the week with most interviews completed from evening calls. When someone answered the phone, the interviewer asked to speak to an adult member of the household unless it was obvious by the person's voice that they could be considered an adult, 18 years of age or older. If there was no answer, up to three call backs were made before a replacement listing was selected. Replacement listings were also selected for disconnected numbers and interview refusals. The objective was to complete 75 interviews in each centre.

Table 1
Size and Distribution of Sample

City	# of Interviews	% of Interviews
Calgary	71	22.7
Great Falls	81	25.9
Lethbridge	80	25.6
Medicine Hat	81	25.9
Total	313	100.0

Note: Some of the percentage totals presented in the tables may not add to 100.0% due to rounding.

4.0 CHARACTERISTICS OF SAMPLE

4.1 Male/Female Composition of Sample

As shown in Table 2, samples obtained had a greater percentage of females as is the case for the population as a whole. While this tendency was less pronounced in Calgary (where the proportions were approximately 46% male and 54% female) it was quite evident and consistent in Medicine Hat, Lethbridge and Great Falls. In these latter cases, the sample was composed of approximately 40% males and 60% females. These ratios of males to females could reflect a bias introduced as a result of the methodology.

Table 2
Male/Female Composition of Sample

	MARKET AREA			
	Calgary (n=71)	Medicine Hat (n=81)	Lethbridge (n=80)	Great Falls (n=81)
Male	45.6%	39.0%	39.0%	40.5%
Female	54.4	61.0	61.0	59.5
Total	100.0%	100.0%	100.0%	100.0%

4.2 Education Level of Respondents

The education level of respondents for each of the four market areas studied are summarized in Table 3. As shown, the most common education level was that of a "High School Graduate" for all four market areas. This ranged from a low of 29% in Medicine Hat to a high of 36% in Calgary. Further examination of this table reveals that Medicine Hat and Lethbridge contain a higher proportion of vocational and technical school trained people than do either Calgary or Great Falls. Conversely, these two cities contain a substantially higher percentage of individuals who report having some University training or being a University graduate than do either Medicine Hat or Lethbridge. This relationship may be reflective of the types of educational institutions in the communities.

Table 3

Education Level of Respondents

Education Level	MARKET AREA Calgary (n=71)	Medicine Hat (n=81)	Lethbridge (n=80)	Great Falls (n=81)
Some Grade School	0.0%	0.0%	0.0%	2.5%
Completed Grade School	4.3	12.5	3.8	2.5
Some High School	5.7	18.8	12.5	3.8
High School Graduate	35.7	28.8	36.3	32.8
Some Vocation/Tech. School	5.7	7.5	1.3	0.8
Vocational/Tech School Grad	2.9	12.5	15.0	3.8
Some University	15.7	12.5	8.8	25.0
University Graduate	25.7	7.5	17.5	22.5
Post-Graduate University	4.3	0.0	5.0	6.3
	100.0%	100.0%	100.0%	100.0%

4.3 Age Distribution of Respondents

There were some noticeable differences in the age structure of the populations in each of the four market areas as shown in Table 4. Calgary tends to have a younger population than any of the other three centres. In this case, nearly 54% of all respondents were 34 years of age or younger. In contrast, Great Falls tended to have a much higher concentration of respondents in the 45 to 54 age category.

Table 4

Age Distribution of Respondents

	MARKET AREA Calgary (n=70)	Medicine Hat (n=81)	Lethbridge (n=80)	Great Falls (n=81)
18 - 24	19.7%	12.5%	12.5%	10.0%
25 - 34	33.8	31.3	26.3	21.3
35 - 44	19.7	20.0	21.3	18.8
45 - 54	8.5	12.5	11.3	23.8
55 - 64	7.0	8.8	7.5	7.5
65 - 74	9.9	11.3	13.8	11.3
75+	1.4	3.8	7.5	7.5
Total	100.0%	100.0%	100.0%	100.0%

4.4 Years Respondents Have Lived in City

A related, yet somewhat different, measure of longevity is given in Table 5. This table categorizes respondents according to the number of years they have lived in the City when this interview was conducted. In this case, however, the major distinction appeared to be between the three Canadian cities and Great Falls. In the case of Great Falls, over 23% of respondents had lived in the City for four years or less. In contrast, the highest corresponding figure for a Canadian city was 11.5% for Calgary. At the other end of the spectrum, Lethbridge appeared to be the most stable city in terms of long time residents. In this case, nearly 70% of all respondents had lived in Lethbridge between 11 and 50 years.

Table 5

Years Respondents Have Lived in City

Years in City	MARKET AREA			
	Calgary (n=71)	Medicine Hat (n=81)	Lethbridge (n=80)	Great Falls (n=80)
1	4.3%	4.9%	3.8%	8.6%
2	2.9	2.5	0.0	2.5
3	1.4	3.7	2.5	8.6
4	2.9	0.0	1.3	3.7
5	4.3	1.2	2.5	1.2
6 - 10	15.7	27.2	16.3	7.4
11 - 25	37.1	32.1	37.5	27.2
26 - 50	27.1	25.9	31.3	33.3
51 - 99	4.3	2.5	5.0	7.4
Total	100.0%	100.0%	100.0%	100.0%

4.5 Size of Respondent Households

There were marked differences across the market areas by the size of respondent households. As seen from Table 6, average household size ranged from 2.6 in Great Falls to 3.1 in Medicine Hat. This may not have any significant implication for the interpretation of the survey results.

Table 6
Size of Respondent Households

Number of Persons in Household	MARKET AREA			
	Calgary (n=71)	Medicine Hat (n=80)	Lethbridge (n=80)	Great Falls (n=81)
1	14.1%	10.0%	15.0%	24.7%
2	31.0	36.3	28.8	37.0
3	22.5	10.0	16.3	8.6
4	19.7	30.0	26.3	22.2
5	9.9	8.8	10.0	3.7
6	1.4	5.0	3.8	1.2
7	0.0	0.0	0.0	2.5
8	1.4	0.0	0.0	0.0
Total	100.0%	100.0%	100.0%	100.0%
Average Household Size	2.9	3.1	2.7	2.6

5.0 SPECIAL QUESTIONS FOR GREAT FALLS RESIDENTS

Because of the special nature of Great Falls (being the only non-Canadian city in the study) a short series of initial questions were asked to determine previous visitation levels to Canada.

5.1 Previous Visits to Canada

The first question in this series enquired whether or not respondents had visited Canada during the past three years. As shown in Table 7, just over 54% of those interviewed indicated they had visited Canada within this three year timeframe.

Table 7
Previously Visited Canada During Past 3 Years
- Great Falls Residents -

Previously Visited	# of Respondents (n=81)	% of Respondents
Yes	44	54.3%
No	37	45.7
TOTAL	81	100.0%

5.2 Frequency of Visitation to Canada

Those who have visited Canada within the past three years were asked to indicate the frequency of this visitation. The distribution of respondents to this question is given in Table 8. As can be seen from this table, the great majority have been relatively infrequent visitors. Only 30% reported that they had visited Canada three or more times during the past three years.

Table 8
Frequency of Visitation to Canada in Past 3 Years
- Great Falls Residents -
(Including only Those Who Reported They Had Visited)

Frequency of Visitation	# of Respondents (n=44)	% of Respondents
1 Time	17	39.5%
2 Times	13	30.2
3 Times	2	4.7
4 Times	4	9.3
5 Times	2	4.7
6 - 10 Times	3	7.0
11 - 23 Times	2	4.7
TOTAL	43	100.0%

Missing Values = 1

5.3 Regions Visited

Responses to this question clearly demonstrated that residents of Great Falls do not tend to travel to parts of Canada other than Alberta and British Columbia. The detailed figures in this regard are given in Table 9. As shown, 84% of Great Falls residents who have visited Canada in the past three years have visited Alberta. By comparison, about 32% have visited British Columbia. All other areas of Canada have been visited by less than 5% of Great Falls residents during the timeframe stipulated.

Table 9
Regions of Canada Visited by Great Falls
Residents During Past Three Years

Region of Canada	% of Those Who Have Visited During Past Three Years (n=44)
Eastern Canada (Ontario East)	4.5%
Northern Canada (N.W.T./Yukon)	0.0
British Columbia	31.8
Manitoba	0.0
Saskatchewan	4.5
Alberta	84.1

5.4 A Note to the Reader

In retrospect, it appears that attempting to use the same questionnaire for the U.S. city of Great Falls and for the three Canadian cities involved, created some difficulties in administration. As will be seen for the next several questions which are discussed, Great Falls residents who had not visited Canada were excluded. Strictly speaking, this is appropriate since it was designed to be primarily a survey of individuals who live in or had some indication of past interest in Canada as a vacation destination. On the other hand, it would also have been appropriate to measure general levels of awareness (for example) of Canada's various national parks, even among those who had not visited Canada previously.

To summarize, when examining some of the tables which follow it will be noted that the number of responses from Great Falls is substantially lower than for the other three cities. This reflects either a possible response was eliminated if the respondent had not visited Canada or the inability to respond to questions on matters concerning Canada in general and Waterton Lakes National Park in particular.

6.0 GENERAL PARKS VISITATION AND AWARENESS

6.1 Previous Parks Visitation

The first question asked of all respondents concerned whether or not they had visited a National or Provincial (State) Park during their vacation or recreation time within the past three years. The distribution of responses to this question is summarized in Table 10. As can be seen, Lethbridge residents have the highest reported level of visitation at nearly 89%. This was followed fairly closely by Medicine Hat (83%) and Calgary (80%). In contrast Great Falls in the corresponding visitation level of only 54%.

Table 10
Visitation to Any National/Provincial (State)
Park During Past Three Years By Market Area

Reported Visitations	MARKET AREA			
	Calgary (n=71)	Medicine Hat (n=81)	Lethbridge (n=80)	Great Falls (n=13)
Yes	80.3%	82.7%	88.8%	53.8%
No	19.7	17.3	11.3	46.2
Total	100.0%	100.0%	100.0%	100.0%
Non-Responses	0	0	0	68 *

* Did not qualify to respond to this question.

6.2 Awareness of Selected Canadian National Parks

One of the primary motivations for conducting this indicator study was to obtain an overall reading concerning the awareness of Waterton Lakes National Park relative to other selected National Parks in western Canada. The results in this regard would appear to be fairly encouraging. As seen from Table 11, awareness of Waterton is nearly 89% in Calgary. This compares with awareness levels of virtually 100% for Banff and Jasper. In the same vane, awareness of Waterton is about the same as for Kootney National Park (92%) and Yoho National Park (90%). It is however substantially higher than for either Elk Island National Park (62%) or Wood Buffalo National Park (61%).

Awareness of Waterton in Calgary is low (89%) when compared with Medicine Hat (99%) and Lethbridge (100%). Conversely, awareness is only about 57% in Great Falls. It is important to keep in mind that the Great Falls percentages are based on a very small sample size.

It is most interesting to note that while awareness of Banff and Jasper is almost total within the Canadian centres, there are substantial variations with respect to awareness of other Parks. For example, Elk Island National Park only scores an awareness level of 44% in Medicine Hat as compared with a high of 62% in Calgary. Conversely, Wood Buffalo National Park obtained an awareness rating of nearly 73% in Lethbridge but only 57% in Medicine Hat.

Finally, it should be noted that the figures reported above are based on aided recall measures in which the name of the Park was mentioned to respondents. Other research has consistently shown the levels of awareness obtained by aided measures can be substantially higher than those obtained from unaided measures. Thus, should it be desired to establish a truer measure of awareness, it would be necessary to obtain additional measures of knowledge concerning each of the Parks in question.

Table 11

Awareness of Selected Canadian National Parks by Market Area

Reported As Aware Of Park	MARKET AREA (%) Calgary (n=71)	Medicine Hat (n=80)	Lethbridge (n=80)	Great Falls (n=14)
Banff	100.0%	98.8%	100.0%	85.7%
Jasper	98.6	98.8	98.8	57.1
Kootney	91.5	72.8	77.5	35.7
Wood Buffalo	60.6	56.8	72.5	14.3
Waterton	88.7	98.8	100.0	57.1
Elk Island	62.0	44.4	61.3	0.0
Yoho	90.0	61.3	78.8	14.3
Non-Responses	0	1	0	67 *

* Did not qualify to respond to this question.

7.0 WATERTON LAKES NATIONAL PARK

7.1 Previous Visitation Levels

Table 12 summarizes the percentage of respondents from each of the four market areas who have visited Waterton Lakes National Park at any time. As shown, visitation levels range from a high of 100% among residents of Lethbridge to a low of 76% for Calgary residents. In general, however, it is seen that a very substantial percentage of the populations of each of the four cities included in the study has, in fact, visited Waterton at some time.

Table 12

Percentage of Respondents Having Ever Visited Waterton Lakes National Park

Ever Visited	MARKET AREA			
	Calgary (n=67)	Medicine Hat (n=81)	Lethbridge (n=80)	Great Falls (n=9)
Yes	76.1%	80.2%	100.0%	77.8%
No	23.9	19.8	0.0	22.2
Total	100.0%	100.0%	100.0%	100.0%
Non-Responses	4	0	0	72 *

* Did not qualify to respond to this question.

7.2 Year of Last Visit

The previous question revealed that a high percentage of respondents have previously visited Waterton. The figures in Table 13 indicate that 43 to 45% of all residents of Calgary, Medicine Hat, and Great Falls who have visited Waterton have not done so since 1980 or before. In striking contrast, nearly 64% of all Lethbridge residents have visited Waterton on a previous occasion during 1987 alone. What emerges from Table 13 is a clear picture in which Waterton is a frequent destination for residents of Lethbridge and a far less important destination for residents of Calgary, Medicine Hat and Great Falls.

In brief, it appears for the market areas of Calgary and Medicine Hat there is a general awareness of the existence of Waterton and a fairly high level of past visitation at some point in time. The challenge would appear to be to increase the frequency of visitation, a point revealed in the following question.

Table 13
Year of Last Visit to Waterton
(For Respondents Reporting Previous Visitation)

Year of Last Visit	MARKET AREA Calgary (n=51)	Medicine Hat (n=65)	Lethbridge (n=80)	Great Falls (n=7)
1987	13.7%	12.3%	63.8%	14.3%
1986	5.9	9.2	16.3	14.3
1985	3.9	7.7	6.3	14.3
1984	9.8	6.2	3.8	0.0
1983	7.8	6.2	2.5	0.0
1982	13.7	12.3	2.5	14.3
1981	2.0	1.5	0.0	0.0
1980 or before	43.1	44.6	5.0	42.9
Total	100.0%	100.0%	100.0%	100.0%
Non-Responses or Did Not Qualify to Respond	0	0	0	2

7.3 Frequency of Past Visitation

The Lethbridge affinity for Waterton is even more clearly demonstrated in Table 14. As can be seen, residents of Calgary, Medicine Hat, and Great Falls report very low frequency levels of visitation to Waterton during 1986 or 1987. With minor exceptions, visiting residents of these three centres have visited Waterton two times or less during 1986 or 1987. Over 53.2% of

visiting Lethbridge residents visited three or more times during the same period. As Table 14 reveals, there are a number of very high frequency users from Lethbridge. In statistical terms, over 25% of visitors from Lethbridge did so on six or more occasions. Of particular interest is the fact that almost 5% report that they visited the park on 26 or more occasions.

Table 14
Frequency of Visitation For Those Reporting They Have Visited
Waterton Lakes National Park During 1986 or 1987

Number of Times	MARKET AREA			
	Calgary (n=10)	Medicine Hat (n=14)	Lethbridge (n=64)	Great Falls (n=2)
1 Time	80.0%	78.6%	21.9%	50.0%
2 Times	20.0	14.3	25.0	50.0
3 Times	0.0	7.1	10.9	0.0
4 Times	0.0	0.0	6.3	0.0
5 Times	0.0	0.0	10.9	0.0
6-10 Times	0.0	0.0	14.1	0.0
11-25 Times	0.0	0.0	6.3	0.0
26-50 Times	0.0	0.0	3.1	0.0
51-99 Times	0.0	0.0	1.6	0.0
Total	100.0%	100.0%	100.0%	100.0%
Non-Responses	0	0	0	0

7.4 Satisfaction Levels

The overall satisfaction levels reported in Table 15 would appear to reflect favourably on Waterton. Residents of Medicine Hat would appear to be most critical in that over 20% judge their level of satisfaction concerning Waterton to be either poor or fair. The corresponding figure for Calgary was 15.7%. In contrast, residents of both Lethbridge and Great Falls expressed virtually zero levels of dissatisfaction with Waterton.

The issue from a management perspective now becomes one of deciding whether it is necessary or desirable to attempt to improve the quality of the experience for the 30% or so which rated their experience as only "good". This would not appear to be an issue for the other 55 to 65% which characterized their experience as either "very good" or "excellent".

Table 15
Overall Satisfaction With Last Visit to Waterton Lakes National Park

Level of Satisfaction	MARKET AREA			
	Calgary (n=51)	Medicine Hat (n=65)	Lethbridge (n=80)	Great Falls (n=7)
Poor	5.9%	3.1%	1.3%	0.0%
Fair	9.8	17.2	2.5	0.0
Good	29.4	23.4	33.8	28.6
Very Good	41.2	32.8	38.8	14.3
Excellent	13.7	23.4	23.8	57.1
Total	100.0%	100.0%	100.0%	100.0%
Non-Responses	0	0	0	0

7.5 Thoughts Concerning Waterton

Comments obtained in response to this question are reassuring, but not particularly revealing in terms of future initiatives that might be taken in the Park. As seen from Table 16, by far the most frequently mentioned comment was that respondents "liked the Park" (114 mentioned). In a similar vein, some 40 individuals mentioned that they "enjoyed their visit". Another 23 mentioned "the nice scenery" while 14 mentioned "the good hiking", 13 noted that Waterton is "uncrowded" and another 12 remarked that it was conveniently located close to them". At the other end of the spectrum, Table 16 reveals that there were very few negative comments willingly offered by respondents.

Table 16

Thoughts Concerning Waterton As A Place To Visit

Respondent Views Mentioned	MARKET AREA Calgary No.	Medicine Hat No.	Lethbridge No.	Great Falls No.	Total Mentions * No.
Enjoyed Visit	12	10	15	3	40
Didn't Enjoy	5	2	0	0	7
Like the Park	16	33	60	5	114
Don't Like Park	0	1	1	0	2
Bad Weather	1	0	3	0	4
Too Much Wind	2	3	0	0	5
Wildlife	3	1	1	0	5
Nice Scenery	11	8	3	1	23
Mountains	2	6	0	0	8
Lakes	2	4	1	0	7
Uncrowded	7	2	4	0	13
Good Fishing	4	1	0	0	5
Good Hiking	6	6	2	0	14
Good Camping	3	1	1	0	5
Long Trip	4	0	0	0	4
Close Location	1	2	8	1	12
Nothing to do	1	2	0	0	3
Opens too late	1	1	1	0	3
Unfriendly	1	0	0	0	1
Uncommercialized	4	3	2	0	9
Bad Experience	1	1	0	0	2
Bad Roads	1	1	1	0	3
Clean, Fresh	1	1	2	0	4
TOTAL	89	89	105	10	293

* Multiple responses allowed.

7.6 Desirability of Waterton During Various Seasons

While the responses to this question might be anticipated, the absolute levels of agreement/disagreement are of interest. As seen from Table 17, there was high agreement that Waterton is a desirable place to visit in the summertime. This level of agreement was approximately 95% in the case of the three Canadian cities and approximately 86% for Great Falls respondents. In contrast, the lowest levels of agreement related to the winter season. While only about 20 to 24% of Calgary and Medicine Hat residents viewed

Waterton as a desirable place to visit in the winter, over 48% of Lethbridge residents were positively disposed towards the winter season.

From a marketing perspective, it is most interesting to look at attitudes concerning the fall and spring seasons. As shown in Table 17, the fall season is generally more highly regarded than is spring, except in the case of Lethbridge residents. In this case, 84% of Lethbridge respondents see the spring as a desirable period for Waterton compared with 82% for the fall. Conversely, Calgary and Medicine Hat residents both perceive the fall as more desirable than spring, by an approximate margin of 10% in each case (75% versus 65% for Calgary and 60% versus 50% for Medicine Hat). Stated somewhat differently, there would appear to be some possibility of convincing Calgary and Medicine Hat residents to increase their frequency of visitation during the spring and fall seasons. While their visitation levels do not appear to be high at present, there is a favourable disposition which presents an opportunity which might be creatively attacked.

Table 17

Perceptions Concerning Desirability of Waterton As A Place to Visit During Different Seasons

Season	Desirable	Calgary	Medicine Hat	Lethbridge	Great Falls
Spring	Yes (%)	65.1%	50.9%	84.1%	60.0%
	Responses (#)	43	55	69	5
	Non-Responses (#)	28	26	11	76
Summer	Yes (%)	96.2%	94.1%	97.4%	85.7%
	Responses (#)	52	68	78	7
	Non-Responses (#)	19	13	2	74
Fall	Yes (%)	75.0%	60.0%	81.9%	60.0%
	Responses (#)	48	60	72	5
	Non-Responses (#)	23	21	8	76
Winter	Yes (%)	20.0%	24.1%	48.4%	40.0%
	Responses (#)	45	58	62	5
	Non-Responses (#)	26	23	18	76

7.7 Suggestions Concerning Changes/Improvements

This question was also considered to be one of the key areas to be addressed by this indicator survey. In terms of building visitation levels to Waterton, it was felt that a question which explored the kinds of improvements to be made in the Park to increase its attractiveness might provide some useful insights. While helpful, the responses to this question indicate a direction that was perhaps not anticipated.

In brief, as seen from Table 18, the single strongest theme that emerged from responses to this question was the desire to either control growth in Waterton or make no changes at all. By closer examination it is seen that this sentiment is the strongest in Lethbridge. It appears then that residents of Lethbridge are quite happy with Waterton as it is and, generally speaking, do not want changes. This sentiment is echoed to a lesser degree by Calgary and Medicine Hat residents.

Despite the strength of this sentiment, it represents only about one-third of the total mentions. As such, it is useful to examine the other two-thirds of the responses which made suggestions concerning improvements they would like to see. As seen from Table 18, the strongest level of support was for the following:

1. More or better facilities in general (13 mentions)
2. More or better camping facilities (13 mentions)
3. More stores and services (11 mentions)
4. More or better accommodation (8 mentions)
5. More parking (8 mentions)
6. More or better restaurants (6 mentions)
7. Lower prices (8 mentions)
8. Better roads (6 mentions)

In summary, there is a general desire for an enhanced level of facilities and services. Taken individually, there is no clear cut concensus as to the need for one specific kind of approach to development or improvement.

However, taken as a whole, there is an overall desire to upgrade the quantity and quality of services available in Waterton on the part of about two-thirds of those responding. At the same time, any initiatives in this direction would not be seen as desirable for the remaining third of respondents, particularly those residing in Lethbridge.

Table 18

Suggestions Concerning Changes/Improvements To Make Waterton More Desirable As A Place to Visit

Suggestions	MARKET AREA				Total Mentions
	Calgary (n=71)	Medicine Hat (n=81)	Lethbridge (n=80)	Great Falls (n=44)	
	No.	No.	No.	No.	No.
More Facilities	2	5	2	0	9
More Camping	3	2	3	0	8
More Accommod.	3	2	1	0	6
More Restaurants	1	1	3	0	5
More Stores/Serv.	2	1	8	0	11
Better Facilities	2	1	1	0	4
Better Camping	2	1	2	0	5
Better Accommod.	1	1	0	0	2
Better Restaur.	0	1	0	0	1
Open Year Round	0	0	5	0	5
More Roads	1	0	3	0	4
Better Roads	3	1	2	0	6
Cleaner	0	1	1	0	2
More Parking	0	0	1	0	1
Lower Prices	0	4	4	0	8
Control Growth	2	3	10	0	15
No Changes	6	4	21	2	33
TOTAL	28	28	67	2	125

8.0 OTHER PLACES AND ATTRACTIONS

8.1 Alberta Places and Attractions

The secondary part of the present survey was designed to measure the extent of which respondents had previously visited other places/attractions in the province during the past three years. A total of fifteen possible destinations were included as shown in Table 19. An examination of the levels of visitation by market area to each of the places/attractions reveals the strong effect of distance on visitation levels.

Table 19
Alberta Places/Attractions Visited During
Past Three Years by Respondents
(percentage which have visited) *

Place/ Attraction	MARKET AREA			
	Calgary (n=71)	Medicine Hat (n=81)	Lethbridge (n=80)	Great Falls (n=44)
Calgary	100.0%	88.9%	95.0%	65.9%
Lethbridge	46.5	80.2	100.0	70.5
Medicine Hat	38.0	100.0	66.3	25.0
Cardston	12.7	13.6	63.8	22.7
Edmonton	80.3	60.5	75.0	34.1
Crowsnest Pass	46.5	55.6	83.8	11.4
Jasper Nat. Park	95.8	58.0	62.5	31.8
Medicine Hat	33.8	24.7	27.5	20.5
Kananaskis Country	90.1	37.0	53.8	4.5
Tyrrell Museum	49.3	33.3	17.5	9.1
Fort Macleod	29.6	32.5	78.8	40.9
Dinosaur Pr. Park	35.2	33.3	27.5	13.6
Cypress Hills Park	8.5	79.0	32.5	6.8
Frank Slide Inter.	21.1	24.7	57.5	11.4
West Edmonton Mall	57.7	44.4	52.5	29.5

* Multiple responses allowed.

8.2 Glacier National Park

As an associated question, respondents were asked to indicate whether or not they had visited Glacier National Park in the past three years. Table 20 summarizes their response to this question. As shown, there is a marked dichotomy between Calgary and Medicine Hat residents whose visitation level is in the order of 15% as contrasted with those of Lethbridge and Great Falls, whose level of visitation is 44% and 69%, respectively.

When asked whether or not they have visited Waterton at the same time as Glacier, 90% of respondents in Calgary made a combined visit as compared with much lower percentages for the other three cities in the study.

Table 20
Previous Visits to Glacier National Park
During Past Three Years

	MARKET AREA			
	Calgary	Medicine Hat	Lethbridge	Great Falls
	(n=71)	(n=81)	(n=80)	(n=81)
Percentage who have visited	15.5%	14.8%	43.8%	69.1%
	(n=11)	(n=12)	(n=35)	(n=56)
Percentage who visited Waterton at same time as Glacier	90.1%	33.3%	51.4%	30.4%

9.0 CONCLUDING REMARKS

Despite its relatively modest scope, the indicator survey nevertheless provides some interesting and useful insights into the manner which Waterton Lakes National Park is perceived and used by the residents of the four centres included in this survey. The highlights of the survey findings are the following:

1. Waterton is generally well known among residents of the centres surveyed. While some improvements can be made, it would appear there is a reasonably high level of awareness.

2. Despite the high levels of awareness in Calgary and Medicine Hat, a large percentage of residents have not visited Waterton for several years. The marketing challenge is to understand and modify this behaviour.

3. Waterton Lakes National Park is a prime recreational area for the residents of Lethbridge. As a result, residents of this city are the most inclined of all respondents to adopt a no growth/no change attitude towards development of the park.

4. There would appear to be some opportunity to enhance visitation levels during the fall and spring seasons. A significant number of Calgary and Medicine Hat residents, in particular, might be convinced to increase their visitation levels during these off-peak periods.

5. In terms of development, a majority of respondents indicated that improvement and some expansion of facilities and services in the park is required. However, as noted in the report there is a significant minority of respondents that do not view changes as desirable.

APPENDIX I:

QUESTIONNAIRE

PANNELL KERR FORSTER

Serial No. _____
Version #6: August 6, 1987

Telephone No. _____ Call No. 1, 2, 3, 4

Time of Interview: _____ a.m., p.m. Name: _____

Directory Page No. _____ Address: _____

WATERTON TOURISM STUDY

TELEPHONE SURVEY OF PRIMARY MARKETS

Ask to speak to an adult member of the household.

HELLO, I'M A MARKET RESEARCHER WITH PANNELL KERR FORSTER, A TOURISM RESEARCH AND CONSULTING FIRM, AND WE ARE CONDUCTING A SURVEY CONCERNING A CANADIAN NATIONAL PARK. I WOULD LIKE TO ASK YOU A FEW QUESTIONS. MY NAME IS .....

FOR GREAT FALLS RESIDENTS ONLY

1a. IN THE PAST THREE YEARS, HAVE YOU VISITED CANADA?

Yes	1
No	2

1b. If yes, APPROXIMATELY HOW MANY TIMES HAVE YOU VISITED IN THE PAST THREE YEARS?

_____ Times

1c. WHAT PARTS OF CANADA DID YOU VISIT IN THE PAST THREE YEARS? Classify answer(s). Write down response if not sure of classification.

	Yes	No
Eastern Canada (Ontario East)	1	2
Northern Canada (N.W.T./Yukon)	1	2
British Columbia	1	2
Manitoba	1	2
Saskatchewan	1	2
Alberta	1	2

1d. HAVE YOU EVER VISITED ALBERTA?

Yes 1 No 2 Don't Know 3

2. HAVE YOU VISITED NATIONAL OR PROVINCIAL (STATE) PARKS DURING YOUR VACATION OR RECREATION TIME WITHIN THE PAST THREE YEARS?

Yes 1 No 2 Maybe 3

3. WHICH OF THE FOLLOWING CANADIAN NATIONAL PARKS HAVE YOU HEARD OF?

	Yes	No	
Banff	1	2	
Jasper	1	2	
Kootenay	1	2	
Wood Buffalo	1	2	
Waterton	1	2	(If no, proceed to Q. 8)
Elk Island	1	2	
Yoho	1	2	

4a. HAVE YOU EVER VISITED WATERTON LAKES NATIONAL PARK?

Yes 1
No 2 (IF NO, PROCEED TO Q. 5)

4b. IN WHICH YEAR WAS YOUR LAST VISIT TO WATERTON LAKES NATIONAL PARK?

Earlier this year	1	1983	5
1986	2	1982	6
1985	3	1981	7
1984	4	1980 or earlier	8

4c. (Ask if "earlier this year" or 1986 response to question). HOW MANY TIMES HAVE YOU VISITED WATERTON LAKES NATIONAL PARK SINCE JANUARY 1, 1986?

_____ times

4d. HOW WOULD YOU RATE YOUR OVERALL SATISFACTION WITH YOUR LAST VISIT TO WATERTON LAKES NATIONAL PARK? Read scale.

Poor	1
Fair	2
Good	3
Very Good	4
Excellent	5

5. BASED ON YOUR PRESENT KNOWLEDGE OF WATERTON LAKES NATIONAL PARK, WHAT DO YOU THINK OF IT AS A PLACE FOR YOU TO VISIT?

_____

_____

_____

6. DO YOU THINK WATERTON LAKES NATIONAL PARK IS A DESIRABLE PLACE FOR YOU TO VISIT: (Read each season question and record response.)

	YES	NO	NO OPINION
IN THE SPRING?	1	2	4
IN THE SUMMER?	1	2	4
IN THE FALL?	1	2	4
IN THE WINTER?	1	2	4

7. WHAT CHANGES OR IMPROVEMENTS TO WATERTON LAKES NATIONAL PARK WOULD MAKE IT MORE DESIRABLE FOR YOU TO VISIT MORE OFTEN OR STAY LONGER IN THE PARK?

_____

_____

_____

8. WHICH OF THE FOLLOWING PLACES AND ATTRACTIONS IN ALBERTA HAVE YOU VISITED IN THE PAST THREE YEARS? Read one by one and record yes or no response for each. Circle yes for the place you are surveying.

	Yes	No
Calgary	1	2
Lethbridge	1	2
Medicine Hat	1	2
.....		
Cardston	1	2
Edmonton	1	2
Crowsnest Pass	1	2
Banff National Park	1	2
Jasper National Park	1	2
Kananaskis Country	1	2
.....		
Tyrrell Museum (Drumheller)	1	2
Fort McLeod	1	2
Dinosaur Provincial Park	1	2
.....		
Cypress Hills Provincial Park	1	2
Frank Slide Interpretive Centre	1	2
West Edmonton Mall	1	2

9a. IN THE PAST THREE YEARS, HAVE YOU VISITED GLACIER NATIONAL PARK IN MONTANA?

Yes	1
No	2 (If no, proceed to Q. 10)

9b. (If yes to 4a and 9a) DID YOU VISIT WATERTON LAKES NATIONAL PARK AT THE SAME TIME YOU VISITED GLACIER?

Yes	1
No	2

FINALLY, I WOULD LIKE TO ASK YOU A FEW QUESTIONS TO ASSIST US IN THE ANALYSIS OF SURVEY RESULTS.

10. WHICH AGE GROUP ARE YOU IN? Read each category and pause after each one until positive response is given.

18 to 24 years	1
25 to 34 years	2
35 to 44 years	3
45 to 54 years	4
55 to 64 years	5
65 to 74 years	6
75+ years	7
Refused	8

11. HOW LONG HAVE YOU LIVED IN _____? ____ Years. Probe for age if "all my life".

12. INCLUDING YOURSELF, HOW MANY PEOPLE LIVE IN YOUR HOUSEHOLD?

_____ people

13. WHAT IS THE HIGHEST LEVEL OF EDUCATION THAT YOU HAVE ATTAINED? (Do not read)

No formal education	1
Some grade school	2
Completed grade school	3
Some high school or secondary school (at least one year)	4
High school or secondary school graduate	5
Some vocational or technical school	6
Vocational or technical school graduate	7
Some university	8
University graduate	9
Post-graduate university	10
Refused	11

14. TO IDENTIFY THE AREA YOU LIVE IN, CAN YOU PLEASE GIVE ME YOUR POSTAL CODE/ZIP CODE?

_____

15. DO YOU HAVE ANY COMMENTS OR SUGGESTIONS ABOUT WATERTON LAKES NATIONAL PARK BEFORE WE END THIS INTERVIEW?

_____

_____

_____

16. Sex of respondent (Do not ask):

Male 1 Female 2

THANK RESPONDENT AND END INTERVIEW.

"I hereby certify that this interview was conducted according to the questionnaire and instruction for this study and that the answers recorded are as given to me by this respondent.

I also realize that a proportion of my work will be checked back with the respondent for verification".

_____
(Interviewer's Signature)

_____
(Interviewer's Name - Please Print)

_____
(Date)

WATERTON TOURISM STUDY
PORTS OF ENTRY
MARKET INDICATOR SURVEY

Prepared for:

Alberta Tourism

Prepared by:

J.R. Brent Ritchie, Ph.D.
in Association with
Pannell Kerr Forster

March 1988

Revised Spring, 1990

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1.0 INTRODUCTION

This survey is one of several smaller research projects designed to support the major Exit Survey conducted at Waterton Lakes National Park during the period November 1, 1986 to October 31, 1987. Because it plays only a supporting role, this survey is referred to as an "indicator". This terminology is meant to clearly communicate that the results, while extremely useful as an indication of respondent views, are not as statistically reliable as would be obtained from a more rigorously conducted full scale survey.

2.0 PURPOSE AND OBJECTIVES

The overall purpose of this survey was to provide a basic understanding of selected travel attitudes and behaviours of foreign visitors entering Alberta at the Carway and Chief Mountain Ports of Entry. Specifically, the research sought to fulfill four main objectives:

- to profile the characteristics of each travel party;
- to profile the purpose and nature of travel being undertaken;
- to determine the primary sources of information used for travel planning; and
- to measure awareness and perceptions of visitors concerning Waterton Lakes National Park.

3.0 METHODOLOGY

Personal interviews were conducted with foreign visitors (non-Canadian) entering Alberta at each of two entry ports, Chief Mountain and Carway located on Alberta Highways 6 and 2, respectively. The corresponding U.S. Highways are 17 and 89 which come from St. Mary, Montana. Chief Mountain and Carway are the closest points of entry to Waterton Lakes National Park from the United States into Canada. Chief Mountain is closest at 22 kilometers from the main gate and Carway at 65 kilometers from the main gate.

The number of interviews completed were 171 at Carway and 175 at Chief Mountain for an overall total of 346. Interviews at Chief Mountain were conducted during the period August 20 to September 12, 1987. Interviews at Carway were conducted during the period August 21 to October 24, 1987. Stint periods were from three to five hours in length. Vehicles with U.S. and international plates were stopped when an interviewer was available. Due to the sampling method, foreign visitors travelling in vehicles with Canadian plates (ie. rented vehicles) were not eligible to be chosen for an interview. Most interviews took 8 to 10 minutes. A copy of the questionnaire is presented in Appendix I.

The actual individual interviewed was selected by the interviewer asking vehicle occupants who were 16 years or older to indicate whose birthday came next. This individual was then asked to serve as the respondent for that vehicle.

Note: **Some of the percentage totals presented in the tables may not add to 100.0% due to rounding.**

4.0 CHARACTERISTICS OF THE TRAVEL PARTIES

4.1 Origin of Visitors

As described in the methodology, only non-residents of Canada were interviewed in this indicator study. The specific distribution of the origin of these visitors is presented in Table 1. As seen, all but 1.8% of those interviewed were residents of the United States. Not surprisingly, nearly one-quarter of the sample reported living in the bordering state of Montana. The single most important distant market was California which provided nearly 15% of respondents. The only other states providing more than 3% of the total were Washington (6.1%), Minnesota (4.6%), Illinois (4.3%), Colorado (3.8%), New York (3.5%), Florida (3.2%) and Oregon (3.2%).

Table 1
Origin of Visitors

(n=346)

Origin	% of Respondents
Montana	24.0%
California	14.7
Washington	6.1
Minnesota	4.6
Illinois	4.3
Colorado	3.8
New York	3.5
Florida	3.2
Oregon	3.2
Texas	2.6
Idaho	2.3
Ohio/Michigan	3.7
Nevada/Arizona/New Mexico	3.2
Oklahoma/Louisiana/Mississippi/Alabama/Georgia	3.0
Nebraska/Wyoming/North Dakota	2.0
Tennessee/Kentucky/North Carolina	1.4
Maryland/Virginia/West Virginia/District of Columbia	2.0
Pennsylvania/New Jersey	1.4
Massachusetts/Vermont	0.9
Wisconsin/Indiana/Iowa	3.8
Kansas/Missouri	2.0
Alaska	0.6
International	1.7
Other (not stated)	2.0
TOTAL	100.0%

4.2 Vehicle Types and Auxiliary Equipment

As shown in Table 2, over 60% of visitors arrived by car. The only other significant categories were truck (15%), van (7.6%) and motor home (7.6%).

A great majority of these vehicles had no auxiliary equipment (Table 3) and a very small percentage had travel trailers or a second vehicle.

Table 2
Vehicle Types in Sample

(N=346)

Vehicle Type	% of Respondents
Car	61.5%
Station Wagon	2.3
Truck	14.9
Truck Camper	3.2
Van	7.6
Motorhome	7.6
Motorcycle	1.7
Bicycle	1.2
TOTAL	100.0%

Table 3
Auxiliary Equipment

(n=346)

Type of Equipment	No. in Sample	% of Respondents
None	334	96.5%
Tent Trailer	2	0.6
Travel Trailer	6	1.7
House Trailer	1	0.3
Second Vehicle	3	0.9
TOTAL	346	100.0%

4.3 Nature of Travel Party

Respondents were asked to choose from a list of phrases which they felt best described the nature of their travel party. The distribution of the responses to this question are given in Table 4. This table reveals that two types of travel parties dominated the sample. The largest proportion of visitors consisted of couples (42%) followed by groups categorized as family/relatives (34%). Some 12% of visitors were travelling alone with another 11% accompanied by friends.

Table 4
Nature of Travel Party

(n=346)

Travel Group Description	% of Respondents
Couple	41.6%
Family/Relative	34.4
Friends	11.3
School Group	0.6
Alone	12.1
TOTAL	100.0%

4.4 Age Distribution of Respondents

The distribution in terms of age of those interviewed is described in Table 5. Of interest is the fact that the single most important age category was that of 55 to 64 years. This group comprised nearly 25% of the sample. The next two most important age categories were 25 to 34 years (19%) and 35 to 44 years (18%). Also of considerable interest was the fact that 14% of those interviewed were in the 65 to 74 age category.

Because those interviewed were by definition 16 years of age or older, the ages of all companions in the vehicle of the interviewee were also recorded. This information for up to three companions is provided in Table 6. Most respondents travelled with one companion ranging in age from 25 to 74.

Table 5
Age Distribution of Respondents

(n=345)

Age Category (years)	% of Respondents
16 - 19	2.0%
20 - 24	6.1
25 - 34	19.4
35 - 44	18.0
45 - 54	13.3
55 - 64	24.8
65 - 74	15.2
75 +	1.3
TOTAL	100.0%

Table 6
Age and Number of Companions

(n=345)

Age Category (years)	Number of Companions			
	0	1	2	3
	Percentage of Persons in Age Category			
0 - 5	91.3	5.8	2.6	0.3
6 - 15	84.4	6.6	6.6	2.3
16 - 19	94.2	5.2	0.3	0.3
20 - 24	93.6	5.2	0.9	0.3
25 - 34	82.1	16.2	1.2	0.6
35 - 44	85.3	13.6	0.9	0.3
45 - 54	83.8	14.7	1.4	-
55 - 64	80.1	18.2	0.6	1.2
65 - 74	83.8	14.2	0.9	1.2
75 +	95.7	4.0	0.3	-

4.5 Size of Travel Party

Table 7 summarizes the percentage of the sample according to the number of persons in each vehicle. As seen, the party size of 2 at 56% was by far the most frequent party size. The average party size was 2.5 persons. Only 7% of all vehicles contained 5 or more persons.

Table 7
Distribution of Size of Travel Party

(n= 346)

Number of Persons In Vehicle	% of Respondents
1	11.8%
2	55.8
3	11.6
4	13.6
5	4.3
6	1.4
7	1.2
9	0.3
TOTAL	100.0%
Average Party Size	2.5 persons

4.6 Male/Female Composition of Travel Parties

The percentage of males and females in the sample of those interviewed was very close to being equal. Males slightly dominated at just over 51% of the total.

Table 8
Male/Female Composition of Travel Parties

(n=346)

Sex	% of Respondents
Male	51.4
Female	48.6
TOTAL	100.0%

4.7 Education Level of Respondents

The education level of respondents is summarized in Table 9. From this table it can be seen that four categories described approximately 80% of all respondents. These were high school graduates (22%), some university education (21%), university graduate (20%), and post-graduate university training (17%).

Table 9
Education Levels of Respondents

(n=346)

Education Category	% of Respondents
Some Grade School	1.2%
Completed Grade School	1.2
Some High School	6.1
High School Graduate	21.7
Some Vocational/Technical School	3.8
Vocation/Technical School Graduate	7.2
Some University	21.1
University Graduate	20.2
Post-Graduate University	17.1
Refused	0.6
TOTAL	100.0

5.0 PURPOSE AND NATURE OF TRAVEL

5.1 Trip Purpose

Responses to this question were of considerable interest in relation to Waterton Lakes National Park. In particular, it was desirable to determine the relative importance of vacation versus non-vacation travel. As seen from Table 10, the response in this regard was encouraging in that over three-quarters of all visitors reported that their primary purpose of their present trip was for vacation, recreation/social or family affairs. All other categories were relatively unimportant, with no single trip purpose representing more than 5.8%.

In the same vein, when asked to indicate if their trip had any secondary purposes, a great majority of respondents (74%) indicated no other purpose (see Table 11).

Table 10
Primary Purpose of Trip

(n=346)

Trip Purpose	% of Respondents
Attending Special Meeting	0.3%
Business	1.4
Personal Business	5.8
Family Affairs	7.5
Vacation	75.4
Day Recreation/Social *	6.3
Other	3.5
TOTAL	100.0%

* Day recreation/social are visitors to the park who came for one day only to participate in recreational or social activities.

Table 11

Other Secondary Trip Purposes

Other Purposes	% of Respondents
None	74.3%
Business	1.2
Personal Business	2.7
Family Affairs	4.4
Vacation	6.8
Day Recreation/Social	7.7
Other	3.5
TOTAL	100.6% *

* Percentages total more than 100.0 as multiple responses were allowed.

5.2 Nights Away From Home

This question attempted to establish the total length of time that the visitors interviewed would be away from their place of residence on this particular trip. The distribution of responses in this regard is summarized in Table 12. As seen, the range of responses to this question was fairly broad. At one extreme 12% of respondents indicated they were spending no nights away from home, conversely nearly 15% reported being away for 31 days or more. The single most popular period away from home was 8 to 14 nights (25%). All other categories employed also contained a significant percentage of respondents.

Table 12

Nights Away From Home on Trip

(n=344)

Number of Nights Away From Home	% of Respondents
0	11.6%
1 - 3	12.2
4 - 7	10.4
8 - 14	24.7
15 - 21	15.7
21 - 31	10.6
31 +	14.8
TOTAL	100.0%

5.3 Nights Spent in Alberta

As can be seen from Table 13, the time spent by visitors in Alberta represented only a fraction of the total length of their absence from home. Whereas 12% indicated they were spending no nights away from home, (Table 12), over 31% reported spending no nights in Alberta. By far the most popular period of stay was one to three nights (43%). In this regard, only 12% had indicated this time frame as being the total period of absence from home. The other extreme, while over 25% of respondents had indicated they would be spending three or more weeks away from home, only 0.3% expected to spend this amount of time in Alberta.

Table 13
Nights Spent in Alberta

(n=346)

Number of Nights	% of Respondents
None	31.4%
1 - 3	43.0
4 - 7	18.4
8 - 14	5.3
15 - 21	1.8
22 +	0.3
TOTAL	100.0%

5.4 Previous Visits to Alberta

When asked whether or not they had previously visited Alberta, nearly 53% of respondents replied affirmatively (see Table 14). Conversely, 47% had not been to Alberta previously.

Of the 183 respondents who had been to Alberta on a prior occasion, nearly 30% indicated that it had been earlier this year (1987). At the other extreme, over 36% reported they had not been back to Alberta since 1980. The full distribution of responses to this question is given in Table 15.

Table 14
Previous Visit to Alberta

(n=346)

Previously Visited Alberta	% of Respondents
Yes	52.9%
No	47.1
TOTAL	100.0%

Table 15
Year of Previous Visit to Alberta

(n=183)

Year of Last Visit	% of Respondents
1987	29.9%
1986	11.4
1985	7.6
1984	6.0
1983	5.4
1982	1.6
1981	1.6
1980 or Before	36.4
TOTAL	100.0%

5.5 Main Destination of In Alberta Trips

This question sought to determine the primary destination within Alberta, if any. As seen from Table 16, Waterton Lakes National Park was by far the single most important destination for those interviewed at the two ports of entry (for 38% of the sample). The other main destinations were Banff (16%), and Calgary (11%). Just over 8% indicated they had no particular destination or were just passing through.

Table 16
Main Destination of Trips in Alberta

(n=346)

Main Destination	% of Respondents
Banff	15.9
Calgary	11.0
Cardston	7.8%
Edmonton	2.6
Jasper	5.2
Lethbridge	4.0
Waterton	38.2
Other	6.9
No Place in Particular	3.2
Passing Through	5.2
TOTAL	100.0%

6.0 INFORMATION FOR TRIP PLANNING

From a marketing perspective, the purpose of this question was to attempt to determine which information sources were employed by visitors when making their decision concerning their visit to Alberta. The results in this regard (see Table 17) are not particularly encouraging. As seen, by far the single most important source of information (used by 44% of respondents) was advice from friends. Other significant sources of information were:

- previous experience (33%);
- noticed Alberta on the map (28%);
- Information Centre (7%);
- travel agent (7%);
- advertisement (7%); and
- automobile association (6%).

Although advice from friends, previous experience and noticed Alberta on the map were the main sources of information, the more traditional sources of information such as advertisements, travel agents and information centres do play a large role. Further reflection, however, is required to determine the cost effectiveness of the various information sources as well as the degree to which they in fact contribute to the major sources reportedly used (especially advice from friends).

Table 17
Sources of Information for Trip Planning

(n=345)

Information Sources	% of Responses	% of Respondents
Advertisement	3.9%	7.0%
Advice of Friends	24.8	44.1
Advice from Glacier	2.8	4.9
Automobile Association	3.4	6.1
En Route Magazine	0.7	1.2
Expo '86	0.3	0.6
Government Agency	0.7	1.2
Information Centre	4.1	7.2
Just Wanted to Come	0.7	1.2
Live Near Border	1.0	1.7
National Geographic	1.6	2.9
Noticed Alberta on Map	16.0	28.4
Own Previous Experience	18.8	33.3
Travel Article	6.4	11.3
Travel Film	1.3	2.3
Travel Show	0.3	0.6
Travel Agent	4.2	7.5
Travel Alberta - Phone	2.3	4.1
Travel Alberta - Mail	3.3	5.8
Travel Magazines	1.8	3.2
West Edmonton Mall	0.3	0.6
Other	1.5	2.6
TOTAL	100.0%	177.8% *

* Multiple responses allowed.

7.0 WATERTON LAKES NATIONAL PARK

The next series of questions dealt specifically with issues or concerns related to National Parks in general and Waterton Lakes National Park in particular.

7.1 Awareness of Selected National Parks

The first in this series of questions attempted to establish awareness in the minds of visitors of seven selected National Parks in western Canada (see Table 18). The results showed that two parks, Waterton and Banff, have the highest level of awareness by 91 and 88% of respondents, respectively. Some 78% claimed to be aware of Jasper National Park. Conversely, much lower levels of awareness were reported for the other four national parks. At the extreme, only 9% of respondents claimed awareness of Wood Buffalo National Park.

The high awareness level of Waterton is perhaps not surprising, in that information concerning this area is available both in Glacier National Park and along the roads leading to the ports of entry where the surveys were completed.

Table 18
Awareness of Selected National Parks
(n = 345)

National Park	% of Respondents Aware of Park
Banff	87.6%
Elk Island	16.8
Jasper	77.5
Kooteney	34.4
Waterton	90.5
Wood Buffalo	9.0
Yoho	19.9

7.2 Level of Previous Visitation to Waterton

While over 90% of respondents were aware of Waterton Lakes National Park, only 29% have previously visited it (Table 19). Of those who have visited, (see Table 20), nearly 29% had done so earlier in 1987, with another 16% doing so in 1986. A sizeable percentage however (33%) had not visited Waterton since 1980.

Table 19
Previous Visitation to Waterton Lakes National Park

(n=340)

Previously Visited	% of Respondents
Yes	29.4%
No	70.6
TOTAL	100.0%

Table 20
Year of Last Visit to Waterton

(n=98)

Year	% of Previous Visits
1987	28.6%
1986	16.3
1985	9.2
1984	4.1
1983	3.1
1982	3.1
1981	3.1
1980 or before	32.7
TOTAL	100.0%

7.3 Intention to Visit Waterton and Glacier Parks this Trip

While only 38% (Table 16) indicated that Waterton was their main destination, over 62% reported their intention to visit Waterton on this trip. This figure was, however, substantially below the 92% intention level for Glacier National Park.

Table 21
Intention to Visit Waterton and Glacier National Parks This Trip

(n=346)

	% of Respondents	
Intended to Visit	Waterton	Glacier
Yes	62.4	91.9
No	37.6	8.1
TOTAL	100.0%	100.0%

7.4 Reasons for Not Visiting Waterton

The 38% of respondents who stated they did not intend to visit Waterton were asked for their reasons in this regard. Their responses are summarized in Table 22. On average, individuals provided about 1.3 reasons of which by far the most important was the claim of not having enough time (59% of respondents). In a somewhat similar vein, 14% claimed they were headed for other destinations. Some 9% reported they did not know about Waterton, 6% indicated they were on a business trip and not a vacation, 6% claimed to have no interest and another 10% simply regarded Waterton as "out of the way".

Table 22
Reasons for Not Visiting Waterton

(n=128)

Reasons	% of Responses	% of Respondents
Not Enough Time	46.3%	58.6%
Did not Know About	6.8	8.6
Other Destinations	11.1	14.1
No Interest	4.3	5.5
Trip not a Vacation	4.9	6.3
Not Enough to See/Do	0.6	0.8
Been There Before	2.5	3.1
Time of Year	2.5	3.1
No Business There	3.1	3.9
Have Seen Glacier	3.1	3.9
Out of the Way	8.0	10.2
Other	6.8	8.6
TOTAL	100.0%	126.7% *

* Multiple responses allowed.

7.5 Reasons for Visiting Waterton

Those who indicated they intended to visit Waterton were asked to indicate their motivations for doing so. Table 23 summarizes the importance of various response categories in this regard. As shown, there were about five major factors involved. These were:

1. the interesting scenery (34%);
2. the fact that Waterton is viewed as part of Glacier National Park and the corresponding desire to see the entire park (31%);
3. for sightseeing (17%) a category partially related to the scenery noted above;
4. had previously visited the park and wished to return (12%); and
5. see the Prince of Wales Hotel (9%).

In reviewing these motivating factors, it is perhaps of interest to note that they tend to be rather general rather than specific. Stated somewhat differently, individuals appear to be drawn to Waterton by two major factors, namely, the expectation of viewing beautiful scenery and the desire to visit what they view as the Canadian section (or at least the rest) of Glacier National Park. In contrast to possible expectations, very few individuals reported a desire to participate in specific recreational activities. The only single item frequently mentioned was a desire to see the Prince of Wales Hotel which in many ways has come to symbolize Waterton.

Table 23
Reasons for Visiting Waterton

(n=216)

Reason	% of Responses	% of Respondents
Interesting Scenery	24.4%	34.4%
Part of Glacier Park/All Park	22.4	31.4
For Sightseeing	11.9	16.6
Previously Visited	9.0	12.4
Prince of Wales Hotel	6.6	9.2
Recommended	5.0	6.9
No Particular Reason	4.6	6.5
Never Been to Waterton	4.0	5.5
On the Way	3.3	4.6
Recreation	2.3	3.2
Never Been to Canada	1.7	2.3
Wildlife	1.3	1.8
National Geographic Article	1.3	1.8
Other	2.3	3.2
TOTAL	100.0%	139.8% *

* Multiple responses allowed.

7.6 Expected Length of Stay

The data in Table 24 clearly indicates that visitors view Waterton as a place to stay for only a short period of time. Over 56% of respondents expected they would not stay overnight. The other extreme, just under 3% indicated they expected to stay three or more nights. Of those who were staying, a great majority were staying for only one night. The average expected length of stay for all respondents to this question was 0.6 nights. For those respondents expecting to stay overnight, the average was 1.4 nights.

Table 24
Expected Length of Stay at Waterton

(n=216)

Expected Number Of Nights	% of Respondents
None	56.2%
1	30.1
2	11.0
3 or more	2.9
TOTAL	100.0%

8.0 CONCLUDING REMARKS

This indicator survey has provided a useful overview of the characteristics of visitors entering the two ports of entry from the United States closest to Waterton Lakes National Park. While the results have been described in the proceeding sections, there are certain highlights which may be useful to emphasize. These include:

1. By the time visitors arrive at the entry ports, Waterton is well known. From a marketing perspective, the issue at this point is one of creating a greater desire to visit Waterton rather than simply providing additional information to create awareness of the Park.

2. Of those crossing the border into Canada, 61.4% indicated their intention to visit Waterton when 81.7% were on vacation or day recreation/ social trips. However, 56% of those who expect to visit Waterton do not intend to stay overnight.

3. The motivations for visiting Waterton appear to be very generic (such as interesting scenery) rather than activity or attraction specific. The one exception was the Prince of Wales Hotel which was noted by 9.2% of the respondents. It will be interesting to compare the results of these stated intentions with the actual reported activities contained in the more complete and comprehensive data derived from visitors responding to the Waterton Exit Survey.

4. Montana is the closest and most significant market. The importance of California as the main long distance market for U.S. visitors to Alberta was confirmed by the responses.

5. Couples and families dominate the visitor market to Alberta, at least as reflected by those entering through the Carway and Chief Mountain ports.

6. A great majority of those entering Alberta through the two ports in question during August and September are arriving on vacation. This fact is reflected in the extremely long length of visit of a great percentage of the visitors.

7. Over half of the individuals sampled reported being repeat visitors. However, well over one-third have not been to Alberta since 1980.

APPENDIX I:

QUESTIONNAIRE

PANNELL KERR FORSTER

Serial No.....
Version #4: August 11, 1987

WATERTON TOURISM STUDY
MARKET INDICATOR SURVEY AT
CARWAY AND CHIEF MOUNTAIN
PORTS OF ENTRY

Interviewer Name: _____

Interviewer No. _____

Date: _____ _____
(Day) (Month)

Exact start time of interview:

a.m.

_____ p.m.

Vehicle	Circle
Car	1
Station Wagon	2
Truck	3
Truck Camper	4
Van	5
Motorhome	6
Motorcycle	7
Bicycle	8
Other (Specify) _____	9

Equipment	
Tent Trailer	1
Travel Trailer	2
Horse Trailer	3
Golf Cart (motorized rider)	4
2nd Vehicle	5

WELCOME TO ALBERTA! THANK YOU FOR STOPPING. WE ARE CONDUCTING A SURVEY OF VISITORS ON BEHALF OF THE GOVERNMENT OF CANADA AND ALBERTA TO GATHER INFORMATION WHICH WILL BE VERY IMPORTANT TO TOURISM IN THIS AREA. TO RANDOMLY SELECT A PERSON FOR THE INTERVIEW, I WOULD LIKE TO KNOW WHOSE BIRTHDAY COMES NEXT. (Ask if person is 16 years of age or older, if questionable. If not, select the person with the next birthday who is 16 years of age or older.)

1. HOW MANY PEOPLE ARE THERE IN THIS VEHICLE? (Can be completed by observation.)

_____ persons

2. WHERE IS YOUR REGULAR PLACE OF RESIDENCE?

_____

(specify nearest Community/State/Country)

*If regular place of residence is in Canada, terminate interview.

3a. (Show Card #1) WHAT IS THE MAIN PURPOSE OF THIS TRIP?
(Interviewer should read out list as interviewee reads the card.)

3b. WHAT ARE THE OTHER PURPOSES OF THIS TRIP, IF ANY?
(Multiple response allowed. Interviewer should read out list as interviewee reads the card.)

	Main (3a)	Other (3b)
ATTENDING A SPECIAL MEETING LIKE A CONFERENCE, CONVENTION SEMINAR OR TRADE SHOW	1	1
BUSINESS	2	2
PERSONAL BUSINESS, SUCH AS SHOPPING, ETC.	3	3
PERSONAL OR FAMILY AFFAIRS, SUCH AS VISITING FRIENDS OR RELATIVES, ATTENDING WEDDINGS, ETC.	4	4
VACATION	5	5
DAY-USE RECREATION OR SOCIAL ACTIVITIES	6	6
OTHER - specify _____	7	7
None or no response	8	8

4. WHICH OF THE FOLLOWING CANADIAN NATIONAL PARKS HAVE YOU HEARD OF?

	Yes	No
Banff	1	2
Jasper	1	2
Kootenay	1	2
Wood Buffalo	1	2
Waterton	1	2
Elk Island	1	2
Yoho	1	2

6. WHAT WILL BE THE MAIN DESTINATION OF YOUR TRIP IN ALBERTA?

Banff	1	Edmonton	2	Waterton	3
Calgary	4	Jasper	5	Lethbridge	6
Other _____	7				
No place in particular	8			Just passing through	9

7. (Show Card #2) PLEASE GIVE THE NUMBER OF THE SOURCES OF INFORMATION YOU USED FOR PLANNING THIS TRIP TO ALBERTA.

	Circle
Saw an ad about Alberta	1
Saw travel article about Alberta	2
Saw travel film about Alberta	3
Received information about Alberta at a travel show	4
Consulted a travel agent	5
Advice of friends or relatives	6
Received literature from Travel Alberta after contacting them by telephone	7
Received literature from Travel Alberta after contacting them by mail	8
Stopped at a Travel Alberta Information Centre	9
Noticed it on a map or in an Atlas	10
Own previous experience	11
Other source - specify _____	12

8. ON THIS ENTIRE TRIP, HOW MANY NIGHTS WILL YOU BE AWAY FROM HOME?

_____ nights

9. OF THESE NIGHTS, HOW MANY NIGHTS WILL BE SPENT IN ALBERTA?

_____ nights

10. HAVE YOU VISITED ALBERTA BEFORE THIS TRIP?

Yes 1 No 2 Skip to Q. 12

11. IN WHICH YEAR WHERE YOU HERE LAST?

Earlier this year	1	1983	5
1986	2	1982	6
1985	3	1981	7
1984	4	1980 or before	8

12 DID YOU OR WILL YOU VISIT GLACIER NATIONAL PARK IN MONTANA ON THIS TRIP AWAY FROM HOME?

Yes 1 No 2

13. ON THIS TRIP, WILL YOU BE VISITING WATERTON LAKES NATIONAL PARK?

Yes 1 Skip to Q. 15 No 2

14. WHAT ARE YOUR REASONS FOR NOT CHOOSING TO VISIT WATERTON LAKES NATIONAL PARK? Write answer as "other" if it does not fit one of the response categories. Probe.

Not enough time to visit	1
Did not know about it	2
I have other destinations	3
Does not interest me	4
I want to visit but my travelling companions don't	5
This trip is not a vacation	6
Not enough to see or do there	7
Lack of hotel accommodation	8
Lack of campsite facilities	9
Lack of nightlife and entertainment	10
Other - specify _____	11
Other - specify _____	12

Skip to Q. 17

15. HOW MANY NIGHTS WILL BE SPENT IN WATERTON LAKES NATIONAL PARK?

_____ nights

None _____

16. WHAT SPECIFICALLY ATTRACTED YOU TO VISIT WATERTON LAKES NATIONAL PARK? Respondent may give several responses. Probe.

Part of Glacier Park	1
Want to visit Glacier and Waterton	2
Told or heard that it had nice scenery	3
I've/We've been there before	4
Offers interesting scenery	5
Opportunities to view wildlife	6
Want to see the Prince of Wales Hotel	7
No particular reason	8
Other - specify _____	9
Other - specify _____	10

17. HAVE YOU VISITED WATERTON LAKES NATIONAL PARK BEFORE THIS TRIP?

Yes 1 No 2 Skip to Q. 19

18. IN WHICH YEAR WAS YOUR LAST VISIT TO WATERTON LAKES NATIONAL PARK? (Circle one).

Earlier this year	1	1983	5
1986	2	1982	6
1985	3	1981	7
1984	4	1980 or earlier	8

FINALLY, I WOULD LIKE TO ASK YOU A FEW QUESTIONS TO ASSIST IN THE ANALYSIS OF OUR SURVEY RESULTS.

19. (Show Card #3). WHICH CATEGORY BEST DESCRIBES THE GROUP TRAVELLING IN THIS VEHICLE?

	CIRCLE
Couple	1
Family/Relatives	2
Friends	3
Business Associates	4
School Group	5
Club/Association/Convention Group	6
Seniors Group	7
By Myself	8
Other - specify _____	9

20. (Show Card #4). WHICH AGE CATEGORY NUMBER ARE YOU IN? (Record response.) FOR EACH PERSON TRAVELLING WITH YOU IN THIS VEHICLE, WHAT AGE CATEGORY NUMBER ARE THEY IN?

		Circle Response	OTHER PERSONS TRAVELLING With the Respondent (indicate number of persons in each age category)
(1)	0 to 5 years	1	_____
(2)	6 to 15 years	2	_____
(3)	16 to 19 years	3	_____
(4)	20 to 24 years	4	_____
(5)	25 to 34 years	5	_____
(6)	35 to 44 years	6	_____
(7)	45 to 54 years	7	_____
(8)	55 to 64 years	8	_____
(9)	65 to 74 years	9	_____
(10)	75+ years	10	_____
	Refused	____	_____

Note: The respondent plus numbers in the second column should equal response to Question #1.

21. (Show Card #5). WHICH EDUCATION CATEGORY NUMBER ARE YOU IN?

No formal education	1
Some grade school	2
Completed grade school	3
Some high school or secondary school (at least one year)	4
High school or secondary school graduate	5
Some vocational or technical school	6
Vocational or technical school graduate	7
Some university	8
University graduate	9
Post-graduate university	10
Refused	____

22. FOR MY SUPERVISOR TO VERIFY THAT YOU WERE SURVEYED, CAN YOU GIVE ME YOUR FIRST NAME, AREA CODE AND TELEPHONE NUMBER?

Name: _____

Telephone No. including area code:

_____ _____

Refused _____

If resident of Canada or U.S.A., ask for Postal Code or Zip Code.

Postal Code/Zip Code _____

Sex of Respondent:

Male 1 Female 2

Port of Entry: Carway 1 Chief Mountain 2

Give respondent our special souvenir and thank him or her for their responses. End interview.

WATERTON TOURISM STUDY

BUSINESS SURVEY

Prepared for:

Alberta Tourism

Prepared by:

Pannell Kerr Forster
in association with
J.R. Brent Ritchie, Ph.D.

February 1988

Revised Spring, 1990

WATERTON TOURISM STUDY
BUSINESS SURVEY

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WATERTON TOURISM STUDY
BUSINESS SURVEY

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1.0 INTRODUCTION

This survey is one of a series of surveys designed to supplement the Exit Survey of visitors to Waterton Lakes National Park conducted during the period of November 1, 1986 to October 31, 1987. The Exit Survey was designed to measure the perceptions, attitudes and behaviours of visitors to the Park. A separate report on the Exit Survey was prepared.

2.0 PURPOSE

The purpose of this survey was to obtain input for developing a marketing plan to improve and develop tourism in Waterton Lakes National Park. To this end, Waterton's business people were asked to answer questions concerning tourism marketing, services, facilities and development in Waterton Lakes National Park.

3.0 METHODOLOGY

In September of 1987, a questionnaire (Appendix) was hand delivered to each business in Waterton Lakes National Park. A postage pre-paid envelope was attached to facilitate return of the completed questionnaire. Approximately 40 questionnaires were distributed. In total, only 17 completed questionnaires were returned. This low rate of response was likely due to the unwillingness of some business people to respond to some of the questions concerning various aspects of their business and their concerns as to the ultimate use of the data.

Due to the small number of questionnaires and the emphasis on qualitative information (open-ended responses and comments), the responses were manually tabulated.

4.0 RESULTS AND OBSERVATIONS

For ease in reading this section of the report, the survey questions posed are included in the tables.

4.1 Year of Business Start

The year of business start range from 1912 to 1987. Six of the 17 businesses started prior to 1975, seven started between 1975 and 1985 and four started in 1986 and 1987 (Table 1). The average age of the businesses in Waterton is approximately 15 years. These results tend to show that the businesses in Waterton are well established although there is a healthy number of recent business starts.

Table 1
Year of Business Start

(n = 17)

1. What year did this business start in Waterton?

	No.
Prior to 1975	6
1975 to 1979	3
1980 to 1985	4
1986 to 1987	4
	17

Range from 1912 to 1987

4.2 Respondent's Position

As shown in Table 2, 12 of the 17 respondents were both the owner and manager of the business. The period that they have been the owner or manager ranged from one month to 19 years. Four of the respondents indicated that they have been in the position for more than ten years (Table 3). Another question was asked concerning the ownership and affiliation of the business. All the respondents indicated that their businesses were independently owned as opposed to being a franchise operation or a branch office.

Table 2
Owner or Manager

(n = 17)

2. Are you the owner or the manager of this business?

	No.
Owner of business	4
Manager of business	1
Both owner and manager	12
	17

Table 3
Years as Owner or Manager

(n = 17)

3. How many years have you been the owner or manager of this business?

	No.
Less than 1 year	1
1 to 2 years	1
3 to 4 years	3
5 to 6 years	4
7 to 8 years	2
9 to 10 years	2
More than 10 years	4
	17

Range from 1 month to 19 years

4.3 Origin of Customers

As shown in Table 4, the respondents indicated that 55% of their customers were from Waterton and Alberta. This is slightly higher than the proportion of all visitors from Alberta (53%) estimated from the results of the Waterton Exit Survey.

Table 4
Origin of Customers

(n = 17)

12. What percentage of your customers would you estimate come from each of the following?

	Average %
Waterton	12
Alberta	43
Rest of Canada	14
United States	27
Other Countries	4
	100%

4.4 Opening and Closing Dates and Potential to Extend Season

Most businesses in Waterton open during the period, May 1 to 14 (Table 5). The closing dates vary considerably. Nearly all respondents indicated closure after September 14. Only one business indicated that they remained open year-round.

Table 5
Opening and Closing Dates

(n = 17)

13. a) What are the usual annual opening and closing dates for your business in Waterton?

	During the Period	No.
Open from	April 1 - 14	1
	May 1 - 14	10
	May 15 - 31	5
To	Sept 1 - 14	1
	Sept 15 - 31	5
	Oct 1 - 14	4
	Oct 15 - 31	6
	Year-Round	1

Eleven of the 17 respondents indicated that there was potential to extend the operating season for their businesses. As shown in Table 6, the maximum feasible operating season can be extended by opening a few weeks earlier and extending the season by nearly a month into October or possibly early November. A few of the businesses indicated that they could stay open year-round. Surprisingly, some of the respondents indicated that the operating season should be shorter in the spring with two respondents indicating opening should occur between May 15 to 31.

Table 6
Potential to Extend Operating Season

(n = 17)

13. b) Do you believe there is potential to extend the operating season for your business?

Yes 11 No 6

If yes, what would be the maximum feasible operating season for your business?

	During the Period	No.
Open from	April 1 - 14	4
	May 1 - 14	2
	May 15 - 31	2
To	Sept 1 - 14	1
	Sept 15 - 31	2
	Oct 15 - 31	4
	Nov 15 - 30	1
	Year-Round	3

4.5 Normal Hours of Operation

The level of detail in responses to this question was not consistent enough to quantify the results. Therefore, Table 7 presents a written summary of the information provided by the respondents.

Table 7
Normal Hours of Operation

(n = 17)

14. What are the normal hours of operation for your business during various periods of the year?

- Restaurants open during various hours throughout the season. They are open 7 days a week, usually in the afternoon through the evenings. The two restaurants who were open opened from May through October.

- On average, gift shops, snack bars and other similar businesses open around 10:00 am and close between 8:00 and 10:00 pm. The stores are

open longer during the summer than during other seasons. Most of these businesses are open from May through the end of September.

- On average, entertainment and activities related businesses are open between 7:00 and 10:00 am and close between 10:00 and 12:00 midnight during summer. They are open 7 days a week during the period from May to October.

4.6 Annual Sales Volume

The distribution of the annual sales volumes for businesses responding to this questionnaire are shown in Table 8 for 1985, 1986 and 1987. Of particular note is the high proportion of businesses with total sales volumes of under $100,000. Given the low profit margins in retail and service outlets, this sales volume is quite low, especially if the business is the main source of income for the owners. A few of the businesses appear to have relatively high sales volumes. However, this must be evaluated relative to the investment in improvements, inventory and personnel.

Table 8
Annual Sales Volume

18. What was the total annual sales volume for your business, over the past three years? Please check the most appropriate category for each year.

		1985 (n=14)	1986 (n=14)	1987 (n=15)
Less than	$50,000	5	4	4
$50,000 to	99,000	5	6	6
$100,000 to	199,000	1	0	1
$200,000 to	299,000	1	1	1
$300,000 to	699,000	2	3	3
		14	14	15

4.7 Expected Sales Change

Ten of the 17 respondents are quite optimistic about future sales. They indicated an average expected increase of 5% to over 20% per year for the next two years. Six of the respondents indicated that sales would remain about the same and only one respondent indicated an expected decrease of 10 to 20% per year over the next two years.

Table 9
Expected Sales Change

(n = 17)

20. All things considered, what do you expect as the sales volume trend for the next two years? Check most appropriate response.

Decrease more than 20% per year	0
Decrease 10 to 20% per year	1
Decrease 5 - 9% per year	0
Stay about the same (plus or minus 4% per annum)	6
Increase 5 to 9% per year	6
Increase 10 to 20% per year	3
Increase more than 20% per year	1

4.8 Monthly Sales Volume

As expected, July and August are by far the most important months for sales by businesses in Waterton. There was insufficient data to report sales volume for each month. The results presented in Table 10.

Table 10
Monthly Sales Volume

(n = 16)

21. What portion of your business volume occurs in each month of the year?

	Average Percentages Reported	% Range	No. of Businesses
January	*	*	*
February	*	*	*
March	*	*	*
April	*	1.5 - 4.0%	15
May	8%	1.0 - 12.5%	15
June	13%	3.0 - 15.0%	15
July	35%	25.0 - 46.0%	15
August	35%	25.0 - 46.0%	15
September	9%	2.0 - 20.0%	15
October	3%	1.0 - 5.0%	3
November	*	*	*
December	*	*	*

* = insufficient data

Hotels and motels were asked to provide information on their annual occupancy rate. Although a few provided this information, there was insufficient number of responses to calculate an occupancy rate for Waterton.

4.9 Number of Employees

Table 11 presents a summary of the number of employees as reported by 16 respondents. On average, a Waterton business has 13.4 full-time, and 2.3 part-time employees during the busiest sales period of the year (ie. July, August).

Table 11
Number of Employees

(n = 16)

23. How many employees, including yourself, do you have during your busiest sales period of the year?

	Total No. of Employees	Range of Responses Min.	Max.	Average
Full-time (32 hours or more per week)	215	2	75	13.4
Part-time (20 to 31 hours per week)	15	1	5	0.9
Part-time (less than 20 hours per week)	22	1	13	1.4
Total number of employees	252			

4.10 Planned Improvements

Twelve of 17 respondents indicated that they expect to implement some improvements to their businesses within the next two years as shown in Table 12. The planned improvements range from finishing expansion projects to hosting a festival to providing new services such as carriage rides and pack trips.

Table 12
Planned Improvements

(n = 17)

19. a) Do you expect to implement some major improvements to your business within the next two years?

Yes 12 No 5

19. b) If yes, please describe them along with a specific timeframe.

- Upgrade of seats, decorating, addition on back
- Finish expansion project
- Increase size of building, initiate a detailed landscaping project
- Carriage rides, pack trips
- Improve existing building, build new building by 1990 including lodge and hotel
- Enlarge building, parking, by 1991
- Host international kite festival within 5 years
- Upgrade rooms and properties
- Improve rooms, add new units
- Upgrade kitchen, bathrooms, build new meeting room

4.11 Opportunity for Business at Waterton's Present Level of Visitation

Eight of the 17 respondents indicated that there was an opportunity for a greater variety of business in Waterton with the present level of visitation. The suggested business opportunities are listed in Table 13.

Table 13
Opportunity for Business at Present Level of Visitation

(n = 17)

5. Do you think there is an opportunity for a greater variety of businesses in Waterton with the present level of visitation?

Yes 8 No 9

If yes, what kind?

- Recreational facilities such as: mini golf, pools, pitch and putt, and trampolines (5 respondents).
- Better quality stores, gift shops and restaurants (4 respondents).
- Better and more quality services in the entertainment scene, including more facilities (3 respondents).

Note: Multiple responses allowed.

4.12 Restrictions to Maximizing Business

The businesses were asked to identify situations which they normally encounter which restrict them from maximizing their business activity in Waterton. As shown in Table 14, the predominant reasons were a short season, bad weather and camping restrictions.

Table 14
Restrictions to Maximizing Business

(n = 15)

8. What situations, if any, do you normally encounter which restrict you from maximizing your business activity in Waterton?

	No.
Short season	4
Bad weather	3
Camping restrictions	3
High land rental rates	2
Restrictions on commercial signage	2
Emphasis on Main Street development	1
Visitors not coming	1
Poor traffic in park	1
Attitude that park closes in the winter	1
Lack of profit for additional expansion or promotion	1

Note: Multiple responses allowed.

4.13 Satisfaction with Shopping Character and Image

Seven of 17 respondents indicated that they were satisfied with the shopping character and image of Waterton. As shown in Table 15, all the respondents that

were satisfied indicated that the unique natural setting in the Park was the most positive business feature. The shopping strip on Main Street was the second most mentioned positive business feature. A coordinated sales promotion was the most popular improvement suggested by respondents. This was followed by coordinated store signage and facade design suggestions.

Table 15
Satisfaction with Shopping Character and Image

(n = 17)

9. a) Are you satisfied with the shopping character and image of Waterton?

Yes 7 No 10

9. b) If yes, what do you consider Waterton's most positive business features?

	No.
Unique natural setting in Park	7
Shopping strip on Main Street	4
Good variety of retail uses	2
Exclusive shops attracting tourists	2
Interesting variety of storefront facades	2
Unique historical/architectural character of Waterton	1

Note: Multiple responses allowed.

9. c) How might the shopping character of Waterton be improved?

	No.
Coordinated sales promotions (tourist promotions, sales, advertising, etc.)	10
Coordinated store signage	8
Coordinated store front facade design	6
More variety in merchandise	5
More variety of shops	4
Other	4
- quality	
- higher quality image	
- more realistic pricing	
- better hospitality attitude	
- store fronts need not to be alike, just nice	
- road passing through Waterton to the U.S.	
More retail outlets	1

Note: Multiple responses allowed.

4.14 Desirable Street Improvements

The respondents identified several types of desirable street improvements for Waterton as listed in Table 16. The most frequently mentioned improvement was removal of overhead wiring. Better road maintenance, more trees and plants and more attractive paving were other street improvements frequently mentioned.

Table 16
Desirable Street Improvements

(n = 16)

10. What kind of street improvements, if any, are desirable for Waterton?

	No.
Removal of overhead wiring	8
More attractive paving	7
More trees & plants	7
Better road maintenance	6
More parking	4
Other	4
- better lighting	
- new sidewalks	
- unchipped curbs	
- commercial signs	
- improved business roads and walks	
- use same style as Main Street and Marina throughout Park	
Painted wall murals	3
Improved street cleaning	2
Community bulletin boards	1
Weather protected sidewalks	1

Note: Multiple responses allowed.

4.15 Facilities or Services Needed In Park

A long list of facilities or services was identified by respondents as being needed in the Park to improve business. As shown in Table 17, no one suggestion received frequent mention. The suggestions range from better lighting to constructing of a new highway through the Park into the United States and British Columbia.

Table 17
Facilities or Services Needed in Park

(n = 15)

15. What facilities or services need to be built, improved or expanded off your premises to improve your business in the Park?

- Fitness centre
- Larger playgrounds
- Build diving bell in bay
- Build changing rooms for wind surfers
- Build ski resort - cross country facilities
- Skidoo rentals and other winter sports
- Boat rentals
- Adjust camping regulations (change the 14 day limit)
- More camping facilities
- Miniature golf
- More indoor recreation facilities
- More family oriented activities
- Expand overnight pack trips
- Build wind fence on pool - improve pool
- Improve lodge, golf course clubhouse, motel complexes
- Coffee shop - family restaurants
- Restaurant facilities
- New highway through Akamina Pass into south B.C. and north Montana
- Highway over Akamina Pass to Flathead Valley
- Road through Park into U.S. and B.C.
- Better entrance facilities to Park
- Streets other than Main Street need trees planted and place to sit down
- Sign regulations need to be enhanced
- General business code area identification
- Tear down existing buildings
- Construct adjacent building to add on services to complement or utilize day use on property
- Need staff accommodation away from business
- Infill of open areas on business properties
- Better lighting

Note: Multiple responses allowed.

4.16 Changes in Park's Policies, Regulations and Services

Table 18 lists the changes or improvements that could be made in Park's policies, regulations and services as identified by the respondents. Although no one particular change or improvement stood out, the most frequently mentioned (two or three respondents) changes or improvements were land rent could be lowered, use overflow campgrounds more, privatize some services and facilities, and relax building codes. Five of the questionnaires did not have any suggestions or changes noted.

Table 18
Changes in Park's Policies, Regulations and Services

(n = 12)

16. What changes or improvements can be made in the Park's policies, regulations and services, while remaining within our National Park's objectives, to improve the business environment in the Park?

- Land rent could be lowered (3 respondents)
- Reduction in gate fees
- Use overflow campgrounds more (2 respondents)
- Privatize some services and facilities (2 respondents)
- Change lease to property ownership
- Let lease be developed to its highest and best use
- Allow more cabins in many empty lots
- Relax building codes (2 respondents)
- A separate lane for pass holders to avoid long waits
- Gate must be streamlined and enhanced
- Avoid making people feel they are trespassing on restricted land
- Create tourism awareness among staff
- Put cover over pool for all weather use
- Allow snowmobiles
- Allow visitor soliciting
- Enforcement of existing regulations so each business is treated fairly
- Most time no one wants to be responsible in decision making

4.17 Services and Facilities to Attract More Visitors

Sixteen of 17 respondents indicated that services and facilities need to be built, improved or expanded to attract more visitors to Waterton Park. If the response was affirmative, the respondents were asked to identify the types of services and facilities in various categories. The long list of suggestions is presented in Table 19.

Table 19
Services and Facilities to Attract More Visitors

(n = 17)

17. a) **Do you think services and facilities need to be built, improved or expanded to attract more visitors to Waterton Park?**

Yes	16	No	1

[Table 19 is continued on the following page]

17. b) If yes, what type are required, if any, in each of the following categories?

Accommodation:
- Lodge (4 respondents)
- Luxurious hotel
- Camping (4 respondents)
- Cabin
- Motorhome campground
- Motel
- Budget hotel
- Cottages

Attractions:
- International tourism
- Fishing
- Hall (3 respondents)
- Family facilities
- Arena
- Mini golf
- Airport
- Scuba diving, ski hill, wind surfing facilities
- Pitch and putt
- Improved golf course
- Live theatre
- Fitness centre

Events:
- Sports
- International kite festival
- Games (2 respondents)
- Dance
- Playhouse theatre
- Cross country and downhill skiing
- Wind surfing
- Garage sales
- Arts and crafts

Promotions and Marketing:
- Expand geographic area for promotions
- More involvement in the Chamber of Commerce
- Expand present programs
- A united approach
- More tours
- Solidified Chamber of Commerce

Personnel (Business and Park):
- Improve attitudes
- Need to be educated in tourism (2 respondents)
- Rental accommodation for employees
- Need hospitality training
- Need new ideas
- Better relations between Parks staff and business community

Programs for Visitors:
- Bigger budget for naturalists (2 respondents)
- Expand visitor services

Businesses:
- Emphasize quality and pride in service (3 respondents)
- More commitment to quality service
- Quality products (2 respondents)
- Allow opportunity to see more of the park

Other:
- Attitudes towards each other need to improve (business, parks, customer)
- Highway to Flathead Valley required
- Year round camping
- Commitment by businesses & Parks Canada to compete successfully for more visitors

Note: Multiple responses allowed.

4.18 Implementation of Marketing Program

All respondents partially or fully agreed that a marketing program should be implemented to attract more visitors and improve their experience in the Park. Their comments in support of this response are shown in Table 20. In identifying what group should be responsible for marketing of tourism in Waterton Park, the respondents indicated that a variety of organizations have a role to play. The most frequently mentioned responses were the Alberta Government, Chamber of Commerce, local businesses and Parks Canada.

Fourteen respondents indicated that they would be willing to join and participate financially in an association of businesses to cooperatively promote tourism in Waterton.

Table 20
Implementation of Marketing Program

(n = 17)

6. a) Do you think a marketing program should be implemented to attract more visitors and improve their experience in the park?

Yes, I fully agree	13
Yes, I partially agree	4
No, I do not agree	0
No opinion	0

Please explain your answer:

- We would like to extend the season and encourage more U.S. visitation.
- We need a longer season and more people.
- More people, more profit, more re-investment would result in a better park.
- The attendance of visitors to the park has been dropping the last few years.
- Waterton is not well known. A good strategy would allow business to be viable.
- Simple! Further extension of present program.
- Perhaps, existing facilities should be upgraded before the marketing push is made.
- I agree with the marketing program to attract people, but not so much to exploit the true beauty of the park.
- A hard sell commercially oriented campaign would distract from the nature of the area.

6. b) If yes, what group(s) should be responsible for the marketing of tourism in Waterton Park?

	No.
Alberta Government	8
Chamber of Commerce	7
Businesses	7
Parks Canada	5
Joint project	2
Waterton Park	2
Tourism Association	1
Federal Government	1
Visitors	1

Note: Multiple responses allowed.

6. c) Would you be willing to join and participate financially in an association of businesses to co-operatively promote tourism in Waterton?

	No.		No.
Yes	14	Already Participate	14
No	0	Need more information	3

4.19 Target Seasons for Marketing

As shown in Table 21, the fall and spring were identified as the most important seasons for concentrating marketing efforts to improve visitation.

Table 21
Target Seasons for Marketing

(n = 17)

7. In what season(s) should marketing efforts be concentrating on improving visitation?

	No.
Summer (July and August)	9
Fall (September and October)	13
Winter (November to April)	6
Spring (May and June)	16

Note: Multiple responses allowed.

4.20 Effective Advertising and Promotion Schemes

Respondents were asked to identify what kind of advertising promotion schemes might be effective in increasing their sales. Nearly all the respondents indicated general advertising about Waterton on TV, radio or billboards would be most effective. Other schemes identified in Table 22 as frequent responses included cooperative advertising flyers, indoor and outdoor events/activities and a brochure indicating the location of businesses and parking.

Table 22
Effective Advertising and Promotion Schemes

(n = 17)

11. What kind of advertising and promotion schemes might be effective in increasing your sales?

	No.
General advertising about Waterton on T.V., radio and billboards	16
Indoor and outdoor events/activities (e.g. art fairs, etc.)	7
A brochure indicating the location of businesses and parking	7
Other	7
- Waterton Glacier Exploration Guide (2)	
- More national and international advertising	
- Mailing to known users of the Park	
- New brochure (2)	
- Increase signage and awareness in and around Park	
Cooperative advertising flyers	6
Accommodation, activity and shopping packages	5
Coordinated service and merchandise sales (e.g. in conjunction with or possibly related to a special event)	4
A logo and theme for Waterton	4
A newspaper or newsletter featuring new developments, scheduled events and activities on the avenue and advertising by merchants	4
Information and shopper convenience services	3

Note: Multiple responses allowed.

4.21 Comments or Suggestions

In addition to the detailed responses to questions, some of the respondents took the time to make additional comments or suggestions as follows:

- Every little town in Alberta is doing the same thing; promoting tourism and festivals. The competition is keen.

- A great number of local and long time park visitors have ceased coming to Waterton because of closure of roads and facilities that were traditional to the Park.

- The only way business can improve in the Park is to have more visitors coming to the Park in the off seasons.

- I feel there should be some control on the type of business allowed in the Park. For example, we have bakeries, cafes, souvenir shops and ice cream stores. If more outlets are necessary, they should be unique.

- Some winter facilities and a through road so that Waterton is on the road and not at the end of the road. It would be the greatest improvement to business and seasons in Waterton.

5.0 CONCLUDING REMARKS

Although less than half of the businesses in Waterton responded to the survey, the results provide some important insight into Waterton's business community. The highlights of the survey findings are:

1. In general, the Waterton business people are quite optimistic about the future. They see a need to cooperate with each other and other organizations in promoting and developing tourism in Waterton Lakes National Park. They see themselves and Parks Canada taking on most of the responsibilities of marketing, with the Alberta Government having a role to play in providing support and conducting broader, more substantial marketing efforts.

2. The best opportunities to improve business appear to be in the spring and fall. Certainly, it is very important for many of the businesses to extend their season in order to be more viable.

3. In improving the shopping character and image of Waterton from the business point of view, the business people have suggested a variety of coordinated opportunities as the solution. Coordinated sales promotions, coordinated storefront facade design and coordinated store signage are some of the ways of implementing a more attractive shopping character and image.

4. In terms of physical improvements, the business people seem most interested in improvements to basic facilities with more and better accommodation - both hotels and campgrounds.

5. It appears most business people recognize the delicate balance between the Park's natural features which attract people and the need for services and facilities for these visitors.

A P P E N D I X :

QUESTIONNAIRE

PANNELL
KERR
FORSTER
Management Consultants

Suite 700, Scotia Place
Tower One
10060 Jasper Avenue
Edmonton, Alberta
T5J 3R8

(403) 422-7114
Telex 037 2761

September 1, 1987

Dear Waterton Business Person:

Subject: Waterton Tourism Study Business Survey

Pannell Kerr Forster, Management Consultants have been retained by Alberta Tourism and Tourism Canada to undertake the Waterton Tourism Study. The ultimate objective of this study is to develop a marketing plan to improve and develop tourism in Waterton Lakes National Park. Of course, this will be done within the guidelines and policies established by Parks Canada for Canada's National Parks.

We are asking you to assist us in preparing this marketing plan by completing the enclosed questionnaire. The results will be compiled by Pannell Kerr Forster and a summary of the data utilized as part of the process in preparing the marketing plan. All individual questionnaires will be kept strictly confidential. Alberta Tourism, Tourism Canada and Parks Canada will not have access to the individual questionnaires. In order for us to prepare the most effective marketing plan with you, it is necessary that candid responses be received.

Using the postage pre-paid envelope provided, please mail the completed questionnaire to us by September 21, 1987. If you have any questions or require more information, please call Ed Romanowski at 422-7114 in Edmonton.

Thank you in advance for you assistance and cooperation in completing this questionnaire.

Yours truly,

PANNELL KERR FORSTER

per: Ed Romanowski, CMC
Partner - Consulting
Edmonton

ER/bas
1-7014

Enclosure

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Serial No. .....

WATERTON TOURISM STUDY

BUSINESS SURVEY

ALL QUESTIONNAIRE RESPONSES WILL BE KEPT STRICTLY CONFIDENTIAL. ONLY A SUMMARY OF THE RESULTS WILL BE USED IN THE STUDY PROCESS.

Business Name: _____

Type of Business: _____
(such as hotel, restaurant, clothing store, souvenir store, service station or otherwise)

Description of Type of
Goods or Services Sold: _____
_____
_____
_____

1. What year did this business start in Waterton?
   _____ year

2. Are you the owner or the manager of this business?
   Owner of business _____
   Manager of business _____
   Both owner and manager _____

3. How many years have you been the owner or manager of this business?
   _____ years

4. This business is:

independently owned _____
a franchise operation _____
a branch office _____

5. Do you think there is an opportunity for a greater variety of businesses in Waterton with the present level of visitation?

Yes _____ No _____

If yes, what kind? _____

_____

_____

_____

6. We would like to know your thoughts about the following points.

a) Do you think a marketing program should be implemented to attract more visitors and improve their experience in the park?

Yes, I fully agree _____
Yes, I partially agree _____
No, I do not agree _____
No opinion _____

Please explain your answer:

_____

_____

_____

b) If yes, what group(s) should be responsible for the marketing of tourism in Waterton Park?

_____

_____

_____

c) Would you be willing to join and participate financially in an association of businesses to cooperatively promote tourism in Waterton?

Yes ____ Already Participate ____
No ____ Need more information ____

7. In what season(s) should marketing efforts be concentrating on improving visitation?

Summer (July and August) _____
Fall (September and October) _____
Winter (November to April) _____
Spring (May and June) _____

8. What situations, if any, do you normally encounter which restrict you from maximizing your business activity in Waterton?

_____
_____
_____
_____

9. a) Are you satisfied with the shopping character and image of Waterton?

_____yes _____ no

b) If yes, what do you consider Waterton's most positive business features?

_____ shopping strip on Main Street
_____ good variety of retail uses
_____ exclusive shops attracting tourists
_____ unique historical/architectural character of Waterton
_____ interesting variety of storefront facades
_____ unique natural setting in Park
_____ other (please specify) _____

c) How might the shopping character of Waterton be improved?

_____ more retail outlets
_____ coordinated sales promotions (tourist promotions, sales, advertising, etc.)
_____ coordinated store front facade design
_____ coordinated store signage
_____ more variety in merchandise
_____ more variety of shops
_____ other (please specify) _____

10. What kind of street improvements, if any, are desirable for Waterton? (Check one or more of the following.)

_____ removal of overhead wiring
_____ better road maintenance
_____ improved street cleaning
_____ community bulletin boards
_____ more parking
_____ more attractive paving
_____ painted wall murals
_____ more trees & plants
_____ weather protected sidewalks
_____ other (please specify) _____

11. What kind of advertising and promotion schemes might be effective in increasing your sales? (Please check one or more of the following.)

_____ cooperative advertising flyers
_____ general advertising about Waterton on T.V., radio and billboards
_____ coordinated service and merchandise sales (e.g. in conjunction with or possibly related to a special event
_____ indoor and outdoor events/activities (e.g. art fairs, etc.)
_____ a logo and theme for Waterton
_____ a brochure indicating the location of businesses and parking
_____ a newspaper or newsletter featuring new developments, scheduled events and activities on the avenue and advertising by merchants
_____ information and shopper convenience services (e.g. shopping carts, business directories, washrooms) _____
_____ accommodation, activity and shopping packages
_____ other: _____
_____ other: _____

12. What percentage of your customers would you estimate come from each of the following?

	%
Waterton (residents, cottagers and business people)	_____
Alberta (excluding Waterton residents, cottagers and business people)	_____
Rest of Canada	_____
United States	_____
Other Countries	_____
TOTAL	100%

Don't know _____

13. a) What are the usual annual opening and closing dates for your business in Waterton?

Open from _____ to _____
Date Date

b) Do you believe there is potential to extend the operating season for your business?

Yes _____ No _____

If yes, what would be the maximum feasible operating season for your business?

Open from _____ to _____
Date Date

14. What are the normal hours of operation for your business during various periods of the year?

Dates	Period ___ to ___	Period ___ to ___	Period ___ to ___	Period ___ to ___
Monday	___ to ___	___ to ___	___ to ___	___ to ___
Tuesday	___ to ___	___ to ___	___ to ___	___ to ___
Wednesday	___ to ___	___ to ___	___ to ___	___ to ___
Thursday	___ to ___	___ to ___	___ to ___	___ to ___
Friday	___ to ___	___ to ___	___ to ___	___ to ___
Saturday	___ to ___	___ to ___	___ to ___	___ to ___
Sunday	___ to ___	___ to ___	___ to ___	___ to ___

15. What facilities or services need to be built, improved or expanded off your premises to improve your business in the Park?

16. What changes or improvements can be made in the Park's policies, regulations and services, while remaining in keeping with our National Park's objectives, to improve the business environment in the Park?

17. a) Do you think services and facilities need to be built, improved or expanded to attract more visitors to Waterton Park?
Yes _____ No _____ If no, go to Question 18

b) If yes, what type are required, if any, in each of the following categories?
Accommodation: _____

Attractions: _____

Events: _____

Promotions and Marketing: _____

_____

_____

_____

Personnel (Business and Park): _____

_____

_____

_____

Programs for Visitors: _____

_____

_____

_____

Businesses: _____

_____

_____

_____

Other: _____

_____

_____

YOUR RESPONSES TO THE FOLLOWING QUESTIONS WILL HELP PROFILE THE EXISTING LEVEL AND IMPORTANCE OF BUSINESS ACTIVITY IN WATERTON.

18. What was the total annual sales volume for your business, over the past three years? Please check the most appropriate category for each year.

	1985	1986	1987 (Project if Necessary)
Less than $50,000			
$50,000 to 99,000			
$100,000 to 199,000			
$200,000 to 299,000			
$300,000 to 499,000			
$500,000 to 699,000			
$700,000 to 999,000			
$1,000,000 to $1,499,000			
More than $1,499,000			

19. a) Do you expect to implement some major improvements to your business within the next two years?

_____ yes _____ no

b) If yes, please describe them along with a specific timeframe.

_____

_____

_____

_____

_____

_____

20. All things considered, what do you expect as the sales volume trend for the next two years? Check most appropriate response.

Decrease more than 20% per year	_____
Decrease 10 to 20% per year	_____
Decrease 5 - 9% per year	_____
Stay about the same (plus or minus 4% per annum)	_____
Increase 5 to 9%	_____
Increase 10 to 20% per year	_____
Increase more than 20% per year	_____

21. What portion of your business volume occurs in each month of the year?

	%
January	_____
February	_____
March	_____
April	_____
May	_____
June	_____
July	_____
August	_____
September	_____
October	_____
November	_____
December	_____
TOTAL	100%

22. If you operate a hotel or motel, what was your occupancy rate for:

	1
1985	____
1986	____
1987	____ (Project if necessary)

23. How many employees, including yourself, do you have during your busiest sales period of the year?

Full-time (32 hours or more per week)	____
Part-time (20 to 31 hours per week)	____
Part-time (less than 20 hours per week)	____

TOTAL NUMBER OF EMPLOYEES____

24. Additional comments or suggestions. Use back of page or additional pages if necessary.

_____

_____

_____

_____

_____

_____

_____

_____

Business Address: _____

_____

_____

Contact Person: _____

Telephone Number: _____

Off-Season Address of contact person, if different from above:

_____

_____

_____

Telephone Number: _____

If you have any questions or require more information, please call Ed Romanowski in Edmonton at 422-7114.

THANK YOU FOR YOUR COOPERATION. YOUR INDIVIDUAL RESPONSES WILL BE KEPT STRICTLY CONFIDENTIAL. PLEASE SEND YOUR COMPLETED QUESTIONNAIRE TO PANNELL KERR FORSTER IN THE POSTAGE PREPAID ENVELOPE.

WATERTON TOURISM STUDY

RESIDENT/COTTAGE

LEASEHOLDER SURVEY

Prepared for:

Alberta Tourism

Prepared by:

Pannell Kerr Forster
in association with
J.R. Brent Ritchie, Ph.D.

February 1988

Revised Spring, 1990

WATERTON TOURISM STUDY
RESIDENT/COTTAGE LEASEHOLDER SURVEY

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WATERTON TOURISM STUDY
RESIDENT/COTTAGE LEASEHOLDER SURVEY

L I S T O F T A B L E S

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1.0 INTRODUCTION

This survey is one of a series of surveys designed to supplement the Exit Survey of visitors to Waterton Lakes National Park conducted during the period of November 1, 1986 to October 31, 1987. The Exit Survey was designed to measure the perceptions, attitudes and behaviours of visitors to the Park. A separate report on the Exit Survey was prepared.

2.0 PURPOSE

The purpose of this survey is to obtain comments and suggestions regarding tourism in the Park from leaseholders as input to the preparation of a tourism marketing strategy.

3.0 METHODOLOGY

In September of 1987, a questionnaire (Appendix) was delivered to all leaseholders in the Park. If they were not present in the Park during the distribution period, the questionnaire was forwarded to their permanent address. Canadian Parks Service employees were also included in the leaseholder survey. A postage pre-paid envelope was sent with each questionnaire to facilitate return. In total approximately 150 questionnaires were distributed. A total of 75 questionnaires were returned.

Due to the small number of questionnaires and the emphasis on qualitative information (open-ended responses and comments), the responses were manually tabulated.

4.0 RESULTS AND OBSERVATIONS

The tabulated results of the survey and observations are presented in the order as asked in the questionnaire.

4.1 Tenancy

In responding to the survey question on tenancy (Table 1), it was found that the average period of tenancy was 23 years. One of the respondents became a leaseholder (likely passed on through family) in 1923. Over 3i% became leaseholders after 1949. The high average length of the tenancy indicates a long term interest in the Park.

Table 1
Initial Year of Lease

(n=75)

Initial Year	No.	%
Before 1930	5	6.7
1930 - 1939	3	4.0
1940 - 1949	6	8.0
1950 - 1959	11	14.7
1960 - 1969	17	22.7
1970 - 1979	11	14.7
1980 - 1987	22	29.3
	75	100.0%

Minimum: 1923
Maximum: 1987
Average: 23 years

Note: Totals may not add to 100.0% due to rounding.

4.2 Level of Visitation

To determine visitation generated by leaseholders, respondents were asked to complete a chart which provided information about the average number of days occupied per month and the average total number of persons during this occupancy. Table 2 summarizes the level of visitation generated by leaseholders for each month of the period from September 1986 to August 1987. Over 61% of the visitation occurs during the period June through September. February had the lowest level of visitation. In total, the responding leaseholders generated 43,138 person-days of visitation to the Park during the period September 1986 through August 1987. Since this includes visiting friends and relatives, it is not possible to establish the proportion of total visitation to the Park attributed to leaseholders.

Table 2
Level of Visitation Generated by Leaseholders

(n=73)

	Total Person Days Occupied	% of Person Days Occupied
Sept 86	3,552	8.2
Oct 86	2,458	5.7
Nov 86	1,707	4.0
Dec 86	1,954	4.5
Jan 87	1,761	4.1
Feb 87	1,580	3.7
Mar 87	1,725	4.0
Apr 87	2,108	4.9
May 87	3,366	7.8
Jun 87	5,200	12.0
July 87	8,827	20.5
Aug 87	8,900	20.6
ANNUAL	43,138	100.0%

4.3 Type of Recreation Equipment

Table 3 identifies the percentage of respondents that had various items available for use at their residence or cottage in Waterton. The most popular items were fishing equipment (88.0%), still camera (86.7%), binoculars (84.0%), and golf clubs (82.7%). On average, each respondent had nearly ten items available for use.

Table 3
Available Equipment

(n=75)

Item	No.	% of Respondents	Item	No.	% of Respondents
Still Camera	65	86.7	Fishing Equip.	66	88.0
Movie Camera	9	12.0	Snorkel/Scuba Equipment	11	14.7
Videotape Camera	1	1.3	Golf Clubs	62	82.7
Binoculars	63	84.0	Sailboard	8	10.7
Field Guides/Booklets	60	80.0	X-Country Skis	30	40.0
Boat	41	54.7	Downhill Skis	18	24.0
Bicycle	62	81.3	Snowshoes	17	22.7
Tent	36	48.0	Motorcycle	9	12.0
Hiking Boots	61	81.3	Canoe/Kayak	32	42.7
Backpacking/Climbing Equip.	50	66.7			

Other:

Item	No.	%
Water skis	3	4.0
Tennis racket	3	4.0
Horse	2	2.7
Dinghy	2	2.7
Saddles	1	1.3
Kites	1	1.3
Skateboard	1	1.3

Note: Multiple responses allowed.

4.4 Need to Build, Improve or Expand

As shown in Table 4, over 65% of the respondents indicated that services and facilities need to be built, improved or expanded to attract more visitors to Waterton Park.

Table 4
Need to Build, Improve or Expand to Attract More Visitors

(n=75)

	No.	%
Yes	49	65.3
No	26	34.7
		100.0%

The respondents offered numerous suggestions for improvements to attract more visitors to Waterton Lakes National Park. There was a total of 212 comments or suggestions or nearly three per respondent. Table 5 provides a detailed listing of the types of improvements or developments as suggested by the leaseholders. The comments and suggestions were divided into eight categories as follows:

- Accommodation (32 comments/suggestions)
- Attractions (48 comments/suggestions)
- Events (25 comments/suggestions)
- Personnel - Business and Park (21 comments/suggestions)
- Promotion and Marketing (17 comments/suggestions)
- Programs for Visitors (17 comments/suggestions)
- Businesses (24 comments/suggestions)
- Other (28 comments/suggestions)

Under accommodation, many responses pertained to providing more or improved campgrounds. Comments and suggestions for fishing, hiking and upgrading of existing facilities were predominant under attractions. Several events and tournaments were suggested including more coordination and cooperation between the businesses and Parks Canada.

There were several comments about the need for better hospitality training and improved attitudes towards visitors by business and Park personnel. Promotion and marketing suggestions related primarily to pricing and better advertising. More outdoor activities and an increase in naturalist programs were the more popular suggestions to improve programs for visitors.

Comments and suggestions about businesses applied mainly to pricing, improvements, new types of services or stores, and the need to change attitudes or commitments of business owners and operators. In the "Other" category, some of the suggestions included providing a road through the Park connecting to British Columbia and Montana, keeping the Chief Mountain Border Crossing open for a longer season and improvements to basic infrastructure and access to the Park and its various facilities.

Table 5
Types of Improvements or Developments Required

(n=75)

Accommodation:

- Backcountry campsites need upgrading, wood supplies, cleaner outhouses, bigger fire grades or deeper fire pits.
- More or improved campgrounds (12 respondents).
- Improved or upgraded hotels (4 respondents).
- Staff accommodation for seasonal employees.
- More rental cottages (2 respondents).
- More quality budget units.
- Family rental units.
- Youth hostel.
- Winter restaurant and lodging (3 respondents).
- Year round accommodation which provide indoor recreation.
- Year round access to accommodation.

No. of Comments/Suggestions: 32

Attractions:

- Fishing (9 respondents).
- Upgrading of existing facilities (4 respondents).
- Hiking (3 respondents).
- Miniature golf (3 respondents).
- Ball diamond.
- Better playground.
- Swimming pool open longer hours (2 respondents).
- Cover swimming pool (2 respondents).
- Hot tub.
- Indoor waterslide.
- Indoor recreation.
- Awareness of cross country ski opportunities (2 respondents).
- Skiing/ski resort (2 respondents).
- Make natural wonders more accessible to public.
- Open Park Buffalo Jump & Indian Tee Pee Rings for visitors.
- Log footbridge across narrows.
- Name lower lake.
- Restore camp kitchen at Cameron Lake.

Attractions (Continued):

- More historical museums.
- More displays for rainy days.
- New theatre (2 respondents).
- Develop & market existing attractions.
- Better signage (2 respondents).
- Get rid of souvenir shops but one, townsite should be designed toward a National Park.
- More amenities.
- More picnic areas.
- Improve golf course.

No. of Comments/Suggestion: 48

Events:

- Ball tournaments.
- Tennis tournaments.
- Boat races.
- Eliminate mountain climbing.
- A nature day.
- Bear grass days (2 respondents).
- Children events.
- Parade/street bands (2 respondents).
- Dance (3 respondents).
- Live theatre.
- More night time entertainment (3 residents).
- Social events such as fiddle contest.
- Celebration on Provincial & Federal holidays.
- Parks Canada should be more receptive to having more events.
- Need more coordination.
- Poor advertising of events (2 respondents).
- Summer theatre.
- Prizes for catching the biggest fish.

No. of Comments/Suggestions: 25

Table 5
Types of Improvements or Developments Required

(Continued)

(n=75)

Personnel (Business and Park):

- Business and Park employees need a course in hospitality and orientation (4 respondents).
- Changes in attitude of management/employees - stress importance of tourism.
- Public relations in most businesses is very poor.
- Park and business employees and owners need attitude change.
  Too many Park personnel.
  Better quality staff required in restaurants.
- Poor service, rude and unfriendly (3 respondents).
- Business and Park employees do not promote Park.
- Poor U.S/Canadian exchange rate.
- Early season closing.
- Park, government and officials have not favoured improved marketing.
- Cut time on getting decisions made locally.
- Lack of communication has led to problems -- quality of Park personnel is high, business personnel is low.
- It's a waste to have french personnel at the info bureau.
- Wardens, naturalists and residents do an exce.lent job with visitors.

No. of Comments/Suggestions: 21

Promotion and Marketing:

- Need more awareness of Waterton by tourism industry.
- Promote beyond 400 to 500 mile radius.
- Promote Waterton in Calgary not Montana.
- Need quality marketing to U.S., Europe and far east.
- Need lots of promoting in U.S.
- More advertising of Waterton by the Federal and Provincial Governments.

Promotion and Marketing (Continued):

- Promote Alberta Tourism to increase their awareness.
- Better media coverage required.
- T.V. commercials required.
- Newspaper ads required.
- Need more business to increase advertising.
- Give colour folder to visitors outlining things to see and do.
- Make people aware of programs.
- Promote cross country skiing.
- Lower Park entrance fee.
- Control price of merchandise.
- Longer season required.

No. of Comments/Suggestions: 17

Programs for Visitors:

- Increase naturalist programs (3 respondents).
- Visitor centre required for programs.
- Tours/walking tours (2 respondents).
- Create programs related to outdoors and nature, preservation and wildlife.
- More movies on Waterton Park explaining geology, glaciology and mineralogy.
- Outdoor activities.
- Better fishing.
- Boat rental.
- Cross country skiing.
- Fitness centre.
- Outdoor movies.
- Live theatre.
- Dance for youth.
- Need more programs in shoulder seasons and winter.

No. of Comments/Suggestions: 17

Table 5
Types of Improvements or Developments Required

(Continued)

(n=75)

Businesses:

- Goods and services too expensive (5 respondents).
- Many businesses need renovation (3 respondents)
- Hot tubs or swimming pools required in hotels/motels.
- A better reasonably priced food store.
- A supermarket is required.
- Year round food services.
- Craft store.
- Bookstore.
- Hardware store.
- Hospital or emergency services -- ambulance/doctors.
- Service centre for tackle and baits.
- Expand marina.
- Ice cream cart in campgrounds.
- Some business people are not good tourist attractions.
- Need more of a commitment from the older owners and operators.
- Prince of Wales Hotel thinks they can manage on their own, the rest of the town markets without a lot of support from them.
- Such businesses as a kite operation has no place in a National Park.
- Shut down Thirsty Bear Saloon and open a larger comfortable and quiet lounge.

No. of Comments/Suggestions: 24

Other:

- Driving route like Logan Pass would allow circle route through both Parks (through road).
- The Kishineen Road should be built to travel through Park.
- Improve road from entrance to town.
- Improve Highway 6.
- Improve roads/streets in general (3 respondents).
- Express lane at gate.
- Landing strip (2 respondents).
- Keep Bighorn Sheep out of townsite.
- Extend fishing season.
- Other accessible lakes should have more fish planted.
- Linet Lake should be made into a marina with gate entrance to keep planted trouts in for senior citizens and children to fish.
- Designate Waterton Lakes as Trophy lakes, restricting the size and number of catch.
- More boats required.
- Boat docking is too expensive.
- Provide access to swimming pool parking lot from east side.
- Develop Linnet Lake as an alternate swimming site.
- Better sporting goods outlets required.
- Skating rink.
- Ball field.
- Repair & update shelter at Alderson Lake.
- Lease fees are too high (2 respondents).
- Extend border crossing to September 30.
- Keep customs at Chief Mountain Open until October 15.
- Keep businesses open until September 30.

No. of Comments/Suggestions: 28

Total No. of Comments/Suggestions: 212

4.5 Liked Most About the Park

Table 6 presents the 195 "Liked Most" comments about the Park. The most often mentioned aspects were peace/quietness (30.7%), its beauty (24.0%), hiking/trails (22.7%), and the scenery (22.7%). Other positive aspects often mentioned by the leaseholders were "not over commercialized", "not crowded", and "small town experience/atmosphere".

Table 6
Liked Most About the Park

(n=75)

	No.	% of Respondents
Peace/Quietness	23	30.7
Its beauty	18	24.0
Hiking/trails	17	22.7
The scenery	17	22.7
Nature/wildlife	14	18.7
Not over commercialized	12	16.0
Swimming	11	14.7
Golf	11	14.7
Fishing	8	10.7
Lakes	7	9.3
Not crowded	6	8.0
Small town experience/atmosphere	5	6.7
Mountains	4	5.3
Activities/outdoor Recreation	4	5.3
Tennis/facilities	3	4.0
Friendly atmosphere	3	4.0
Feel safe...to walk etc.	3	4.0
Boating	2	2.7
Gathering place	2	2.7
Picnic facilities	2	2.7
Non-tourist season	2	2.7
People	2	2.7
Fresh air	2	2.7
Floral features	1	1.3
Marketing assets	1	1.3
Ability to do what you want	1	1.3
Summer and winter extremes	1	1.3
Climbing	1	1.3
Accessibility	1	1.3
Rural simplicity	1	1.3
Clean/well kept	1	1.3
Theatre	1	1.3
Ranger lecture	1	1.3
No through road	1	1.3
No pressure	1	1.3
Pine scented air	1	1.3
Sitting areas	1	1.3
Trees	1	1.3
Walks in the Park	1	1.3
History	1	1.3
	195	

Note: Multiple responses allowed.

4.6 Liked Least About the Park

The price of goods, the wind, business/owner attitudes and various items pertaining to leases and Parks Canada rules, regulations and prices were the least liked items about the Park. A total of 103 least liked items were mentioned as summarized in Table 7.

Table 7
Liked Least About the Park

(n=75)

	No.	% of Respondents
Price of goods	7	9.3
The wind	7	9.3
Business owner attitudes	5	6.7
Type of lease/limitations	5	6.7
Federal Government regulations	5	6.7
Parks Canada staff/attitudes	4	5.3
Price of entrance	4	5.3
Parks Canada administration	4	5.3
Congestion at gate	3	4.0
Bear problems	3	4.0
Short season	3	4.0
Narrow entrance road	2	2.7
Unfriendly service delivery	2	2.7
Going through red tape	2	2.7
Building codes	2	2.7
Winter closure	2	2.7
Bad weather	2	2.7
Roads	2	2.7
Price lease	2	2.7
Cement & pavement at Cameron Lake	2	2.7
Closing of Snowshoe Road	2	2.7
Commercialism	2	2.7
Garbage regulations	2	2.7
Ugly buildings	1	1.3
Shops	1	1.3
Food business	1	1.3
Shabby shutters on buildings in off-season	1	1.3
Too many golf tournaments	1	1.3
Employees	1	1.3
Lack of community spirit	1	1.3
Lack of walking paths	1	1.3
Price of camping	1	1.3
Bighorn Sheep in townsite	1	1.3
Marina	1	1.3
Not allowing overflow use for camping	1	1.3
Too many Park personnel	1	1.3
Poor boat launching	1	1.3
Wire fencing	1	1.3
Cement buildings	1	1.3
Post office building	1	1.3
Too much control by certain groups	1	1.3
Too much control by environmentalists	1	1.3
Leaving row boats at Cameron Lake	1	1.3
Not allowed to pitch tents or trailers in own back yard	1	1.3
Gophers	1	1.3
Trailer Park location	1	1.3
Horse manure on trails	1	1.3
Run down cottages	1	1.3
Proposal to increase development outside townsite	1	1.3
Stores close too early	1	1.3
Nothing for teenagers to do	1	1.3
Too many tourists	1	
	103	

Note: Multiple responses allowed

4.7 Facilities or Services to Improve Experience or Satisfaction

The respondents identified 91 items that needed to be built, improved or expanded in the Park to improve their experience or satisfaction as leaseholders. The most popular items were stock lakes with fish (12.0%), improve highways/roads (6.7%) and improve golf course/service (6.7%). Overall, the suggestions to improve the experience or satisfaction of the leaseholder did not have any predominant responses. Everyone seemed to have very individual views on how to improve their experience and satisfaction in Waterton Lakes National Park.

Table 8
Facilities or Services To Improve Experience or Satisfaction of a Leaseholder

(n=75)

	No.	% of Respondents
Stock lakes with fish	9	12.0
Improve highways/roads	5	6.7
Improve golf course/service	5	6.7
Clean up Lake Linnet	4	5.3
Better entrance/passholder lane	4	5.3
Improve sidewalks	3	4.0
Boat docking facilities	3	4.0
Cover swimming pool	3	4.0
Marina/expand	2	2.7
Plant trees	2	2.7
Bicycle/jogging paths	2	2.7
Clean drinking water	2	2.7
Recreation centre	2	2.7
Hall/Arena for major events	2	2.7
Skating rink	2	2.7
Garbage regulation	1	1.3
More swimming lessons	1	1.3
More trail guides	1	1.3
Improve parking facilities at Cameron/Townsite	1	1.3
Falls are dangerous for children	1	1.3
Shoot all bears	1	1.3
Indoor/outdoor basketball	1	1.3
Restaurant for young people	1	1.3
Improve existing facilities	1	1.3
Upgrade run down buildings	1	1.3
Upgrade picnic shelters	1	1.3
Concessionaires should operate longer	1	1.3
Dance hall	1	1.3
Track ski trails	1	1.3
Introduce Columbia ground squirrel program	1	1.3
More evening facilities	1	1.3
Winter sports	1	1.3
More organized hikes	1	1.3
Year round grocery services	1	1.3
Footbridge across narrows	1	1.3
Underground wiring	1	1.3
Indoor activities	1	1.3
Better stove in shelter at Alderson Lake	1	1.3
Allow houseboats for short period	1	1.3
Air strip adjacent to Park	1	1.3
Build another campground	1	1.3
A better theatre	1	1.3
Keep the pool	1	1.3
Emergency services	1	1.3
Snow removal	1	1.3
Better restaurants	1	1.3
Ball diamond	1	1.3
Easy hiking trails	1	1.3
New pub	1	1.3
Fitness centre	1	1.3
Upgrade laundromat	1	1.3
Remove Kentucky Fried Chicken, but keep gas station	1	1.3
New info centre	1	1.3
Road to B.C. and Montana through Park	1	1.3
Horse pack trips	1	1.3
Hot tubs	1	1.3
	91	

Note: Multiple responses allows.

4.8 Other Comments and Suggestions

Forty-two of the respondents took the time to make extensive comments and suggestions about improvements and development, the role of a National Park, the utility of conducting a survey, and numerous other topics. The comments and suggestions are as follows:

- Waterton's landscape needs to be preserved. The Park cannot be all things to all people. I don't believe that the Park should attempt to satisfy everyone's desire. Rather, people must realize why the Parks are established "to protect the environment."

- I believe the future for Waterton is good; however, it will take a good deal of effort and creative thinking to do so. I hope your people's input and abilities shed some light on our past problems.

- I feel that Parks Canada gets a little too carried away with protecting the Park. I realize there must be a balance, but on the same token, I'm tired of being told it's been saved for the future generations when I can't get to experience it or see it. They are trying to discourage horse back riding because of the impact on the trails and the hiker/horse confrontation. I feel there is room for both. Each year they seem to discourage visitor usage rather than trying to increase visitor usage.

- Advertising of events hasn't been adequate. Planned activities for children on a drop in basis could be of benefit.

- I understand more wheelchair accessible trails/paths are being created. This is long overdue.

- We need to keep the swimming pool running and in good repair. To close it would cause problems; people will swim in the lake without life guards, etc. The entrance to the Park is fine as it is.

- It's too bad so much money was wasted on the garbage problem instead of some of it being used to clean up Lake Linnet. This is the fourth year my children have not been able to take swimming lessons due to classes being filled. It's first come first served. I'm not driving two hours to receive a no answer. We don't receive any information about registration day. This year I was told to go to Cardston. With P.R. like that the chances are slim I would take out a family membership. All of the other communities benefit 100% and even though we pay the high taxes, it seems we have no rights. Maybe this is why they are having problems keeping the pool running due to lack of funds.

- Certainly should start stocking the lakes with fish.

- National Parks were created for the preservation of wildlife and natural surroundings. If one listens to developers, businessmen, and the public in general, they seem to want a Disney World surrounding when they come here. This is a complete opposite to what the Park was created for. A comprehensive education program about National Parks should be instituted so people understand why major development cannot be allowed in a National Park, especially one as small as Waterton.

- Leaseholders should not have to pay the Park gate fees. Leaseholders should be exempt from paying school tax unless able to use cottage year round. Enclose pool.

- Surveys have been done, strong support has been expressed, Government funding from Alberta has been supplied, but a proposal to have Parks contribute was denied. The money to conduct this survey could have topped off the play field quite nicely. What do we get instead? another survey! to benefit who?

- Later (evening) hours needed at pool. Also family and seasonal tickets needed at pool for Park residents and summer residents. One week, two weeks, month or season tickets.

- For the summer time, we really appreciate all that is done to make the Park ready, clean and attractive, and hope that one day it will develop into a year round Park.

- There should be a pass gate for residents and leaseholders.

- I think you have got to bring some life back into the Park. The main street improvements have been great. We have got to have more action done by Park officials. The film shown each night about the Park is good, but some of them are getting old now, and new blood should be put into that program. I think that your charge at the entrance of the Park is way too much, and have many complaints about this. They compare the U.S. fees and they are so much less, and I'm sure it leaves a bad impression of the Parks in Canada.

- Helicopter tours of the valley like Hawaii with rules to stay high enough to not bother animals.

- I have to shut water early because of possible freeze up of pipes. It is very difficult to get repairs for plumbing or any types of services.

- I have been in business in the park all my life and the most common complaint is there is nothing to do. Not every one hikes, fishes and takes pictures. Other people are also entitled to a Park atmosphere. There should be more drive in areas. Not everyone can walk or ride a horse. I do not feel however, the business and service facilities should be expanded beyond the present townsite.

- Chief Mountain Customs needs to be open until October 15. Provide access to the swimming pool lot from the east side. Name lower

Waterton after Kootenai Brown. Develop the large area of the north shore of the middle Waterton Lake as the main campground area. Develop the lower Waterton Lake as a recreational area for water skiing, boating, swimming and picnicking. Cut the thistles along the road each side of the information office. Freeze the current lease rental fees for 25 years.

- Complete Akamina Road to form a west link to Apgar Village in Glacier Park.

- A bonus of tourism in Waterton is the attitudes and efforts of Park personnel and employees. Most are courteous, friendly and try to help. It bothers me to be told that a drinkable water system is in the works but not in the budget this year (1985 86 87 announced it will start in 1988). This and other necessities are too costly; however, "back to nature" with imported bricks, concrete and pavement are affordable and so is this survey which like others done, will also be a waste of tax payer's money.

- The Parks Canada personnel have an attitude problem with American visitors to Waterton. Compared to American National Parks, I find that visitors to Waterton are received much on an attitude of intruders rather than guests. It appears that Parks Canada personnel would prefer to convert Waterton to a private wilderness area. The attitude pervades the whole Park culture, and detracts from the beauty of Waterton.

- It is important that the pool facilities remain open. We know it does not pay for itself, but only close it when all else fails. Day visitors need it if hiking or boating is not to your liking. The new entrance proposed for the next year, providing funding is in place, is really necessary. The yearly leaseholders often waits unnecessarily.

- You can pay for a trip to Pincher Creek or Cardston for groceries by not buying a few items in Waterton. No local people are dumb enough to shop here. I overhead a store owner telling an American visitor if he couldn't afford the price on some canned goods to go home. A great way to encourage tourism.

- We feel strongly that there should be a daily fee for using the Park, separated from the 3 - 4 day pass. Many people like to drive up for the day, and tourists who are just stopping by to view the area might drop in if the fee was lower. Also, the camping cost seems plenty high.

- The improvements to Main street are very nice.

- We and our family have used the Park every summer since 1949. We are now enjoying the Park in the winter. Its cross country ski trails are being maintained and improved. As far as we are concerned, the Park staff are doing an excellent job and hope that nothing will be done to

spoil the tranquillity of the Park. We feel we are among the Park's greatest boosters!

- The sidewalks and street treatment in the village are very well done. It added a nice touch. Too bad the motel that blocks the view of the marina can't be removed. Waterton is quiet, I hope plans are not drawn with the motive of increasing traffic and crowds to give us a mess like Banff has turned into.

- Keep it simple, stop construction, except to change post office, golf course club house and other typical Government buildings. Maintain existing facilities.

- More pull-offs and/or parking lanes are needed to reduce traffic congestion and safety concerns.

- Many more trees could be planted in the townsite. A comprehensive long-term tree planting program is desperately needed.

- In 87, the Chamber of Commerce advertised many events that were cancelled at the last minute. They should deliver the goods or go easy on the advertising. Get organized! Hospitality and Park orientation training is required for Park and commercial business staff.

- Kilmorey Lodge open year round is good.

- We have been spending the last 10 years in Waterton during the summer. It is a lovely place, but I do feel that it is lacking since the dance hall was closed. We don't live in the past but at least young people looked forward to vacation there then. I realize that it is not a problem exclusively to Waterton, but because there is nothing but the theatre to act as a meeting place, we feel that something could be done. Somehow, when one has a family it means one has teenagers! I love them but would like to give them the opportunity to meet others. Dances don't seem to be the answer, they need a "hang out".

- The entrance gate in July and August can get congested, there should be a third lane for those that have already bought their permit just to pass through (similar to Banff).

- We find that obtaining groceries and sundry items in the Park is very costly. Since we are aware of this, we bring all we can with us, but of course we invariably end up buying items which are greatly marked up. We are of course aware that there is a short selling season "supply and demand" etc., but I would dearly love to see another grocery store to supply some competition to the existing one. My dream is to never have to haul ten bags of groceries, three coolers of meat, and dairy products, but to buy all our requirements once we get there, at comparable prices to those at home.

- For the most part, the leaseholders, Park employees and the grizzlies have a wonderful situation. Visitors find there is no place for them

in Waterton because of lack of camping and trailers or mobile home place within sight of the lakes and the gorgeous view. The cabins that once were available at a nominal rent for families have been removed. The high toll at the entrance gate, the increased cost for boat rides or horseback rides, the fear of hiking the trails, the poor fishing, the problems with boats (not being able to leave them on beach as at Cameron Lake), the limited number of motels, makes it almost prohibitive for a family to spend a week in Waterton Park. The swimming pool has not been used to capacity. Trailer park has a high percentage of retired people, but not many families around. It seems to me that you are caught between keeping the Park from being over crowded, and trying to attract more tourists. The townsite does have a problem for space, but then there is five (more/less) miles of open space where facilities could be expanded.

- I am wondering why the bathrooms were removed from Carthew Lakes. It is awkward for women on such a long hiking trail from Cameron up to Carthew and down to Alderson and then to find only one bathroom at Alderson. When we first began hiking, there were more shelters and bathrooms and much less people on the trails.

- If more tourists are wanted from U.S. and other provinces of Canada, a road through to B.C. is required so the Park is not a dead end. Prices need to be lowered, especially at grocery stores for campers.

- Picnic shelters (rain shelters) part way down Cameron Lake and weather shelters at Carthew Lakes. Keep Chief Mountain Customs open longer into September to attract more visitors. Hire more western Canadian students who know the area and not always French who are terrible with the language and don't know the trails. The Park is basically less and less accessible to people who are older and not in their peak physical condition.

5.0 CONCLUDING REMARKS

The survey of leaseholders provided valuable insight to their needs relative to the needs of most visitors. The respondents gave considerable thought and time to the completion of the questionnaire. Many of their comments related to the broader visitor experience rather than their own needs as leaseholders. General conclusions from the survey results are:

1. Most respondents are long time leaseholders (average of 23 years). It appears that the leaseholders are maintaining a certain type of laid back lifestyle in the Park judging from their comments. Some of them understand and promote a balance between increased visitation and the maintenance of the Park environment for future generations and for their own enjoyment.

2. There is an overall interest in maintaining the character and qualities of Waterton Lakes National Park but also an interest in having basic conveniences and services available for visitors and themselves.

3. Very few of the leaseholders see a need to expand development outside of the existing townsite or to improve access through the Park. However, many of them identified a need to improve services and facilities in the townsite, expand some services such as accommodation and shops for basic goods and services, merchants to sell goods and services at lower prices, and the need to improve infrastructure such as roads and trails.

4. There were many good suggestions made by the leaseholders that indicate that tourism development should respect the character and environment of the Park. Yet, it is in the best interest of the Park to develop some new services and facilities to improve the experience for visitors and leaseholders.

5. This is a special interest group of leaseholders that has many and varied views on the types of improvements or developments required in

Waterton Lakes National Park. Seventy-five respondents provided 212 written suggestions for improvement or development.

A P P E N D I X :

QUESTIONNAIRE

PANNELL
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FORSTER
Management Consultants

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T5J 3R8

(403) 422-7114
Telex 037 2761

September 1, 1987

Dear Waterton Leaseholder:

Subject: Resident/Cottager/Leaseholder Survey

Pannell Kerr Forster, Management Consultants, have been retained by Alberta Tourism and Tourism Canada to undertake the Waterton Tourism Study. The purpose of this study is to develop a marketing plan to improve and develop tourism in Waterton Lakes National Park. Of course, this will be done within the guidelines and policies established by Parks Canada for Canada's National Parks.

As a leaseholder in Waterton Lakes National Park, we are interested in your comments and suggestions regarding tourism in the Park. The enclosed questionnaire provides an organized format for your input. We would appreciate the completion and return of the questionnaire using the enclosed postage pre-paid envelope by September 21, 1987. Your responses in this questionnaire will be kept strictly confidential with the results compiled by our firm and used in a summary form during the study process. Individual questionnaires will not be made available to Alberta Tourism, Parks Canada or Tourism Canada.

Thank you in advance for you cooperation and assistance by completing this questionnaire.

Yours truly,

PANNELL KERR FORSTER

per: Ed Romanowski, CMC
Partner - Consulting
Edmonton

ER/bas
1-7014

Enclosure

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Serial No. .....

WATERTON TOURISM STUDY

RESIDENT/COTTAGER LEASEHOLDER'S SURVEY

ALL QUESTIONNAIRE RESPONSES WILL BE KEPT STRICTLY CONFIDENTIAL. ONLY A SUMMARY OF THE RESULTS WILL BE USED IN THE STUDY PROCESS.

1. Name of Respondent: _____

   Complete Leaseholder Address in Waterton: _____

   _____

   Complete Permanent Home Address: _____

   _____

2. In what year did you become a leaseholder in Waterton Lakes National Park?

   Year _____

3. a) Are you or your immediate family the principal users of the residence/cottage in Waterton Lakes National Park?

   Yes _____ No _____

   b) If no, where does the principal user live?

   Complete name and address: _____

   _____

   _____

If you or your immediate family are not the principal users of the residence/cottage in Waterton Lakes National Park, please stop here and return this questionnaire to Pannell Kerr Forster in the postage prepaid envelope.

4. To help us determine the level of park visitation generated by leaseholders, please complete the following chart for the 12 month period, September 1, 1986 to August 31, 1987.

	No. of Days Occupied	X	Average No. of People/Occupied Days	=	Total Person Days Occupied Per Month
Example:					
August 1986	20	X	3	=	60
September 1986		X		=	
October 1986		X		=	
November 1986		X		=	
December 1986		X		=	
January 1987		X		=	
February 1987		X		=	
March 1987		X		=	
April 1987		X		=	
May 1987		X		=	
June 1987		X		=	
July 1987		X		=	
August 1987		X		=	

5. What of the following items were used or are available for use by you, your family or friends at your residence/cottage in Waterton?

Still Camera	____	Bicycle	____	Golf Clubs	____
Movie Camera	____	Tent	____	Sailboard	____
Videotape Cam.	____	Hiking Boots	____	X-Country Skis	____
Binoculars	____	Backpacking/		Downhill Skis	____
Field Guides/		Climbing Equip.	____	Snowshoes	____
Booklets	____	Fishing Equip.	____	Other: ____	____
Boat	____	Snorkel/Scuba		No items	____
Canoe/Kayak	____	Equipment	____		
Motorcycle	____				

6. a) Do you feel services and facilities need to be built, improved or expanded to attract more visitors to Waterton Park?

Yes _____ No _____ If no, go to Question 7

b) If yes, what type are required, if any, in each of the following categories?

Accommodation: _____

_____

_____

_____

Attractions: _____

_____

_____

_____

Events: _____

_____

_____

_____

Promotions and Marketing: _____

_____

_____

_____

Personnel (Business and Park): _____

_____

_____

_____

Programs for Visitors: _____

_____

_____

_____

Businesses: _____

_____

_____

_____

Other: _____

_____

_____

7. What do you <u>like most</u> about the park?

8. What do you <u>like least</u> about the park?

9. What facilities or services need to be built, improved or expanded in the Park to improve your experience or satisfaction as a leaseholder?

10. Other comments and suggestions:

Use back of page if necessary.

If you have any questions or require more information, please call Ed Romanowski in Edmonton at 422-7114.

THANK YOU FOR YOUR HELP. PLEASE RETURN THE COMPLETED QUESTIONNAIRE TO PANNELL KERR FORSTER IN THE POSTAGE PREPARED ENVELOPE.